

# LOUISIANA TECH UNIVERSITY

## REQUEST FOR PROPOSALS



PROPOSER MUST FILL IN COMPANY NAME AND  
COMPLETE ADDRESS (PRINTED OR TYPED)

RETURN THIS FORM TO:

**PURCHASING OFFICE**  
P.O. Box 3157  
208 Keeny Circle, Rm. 408  
Ruston, LA 71272

Phone: 318-257-4205  
Fax: 318-257-3772

Company Quote #  
if applicable

PHONE:

FAX:

EMAIL:

**FAILURE TO SIGN WILL DISQUALIFY PROPOSAL**

PROPOSAL SUBMISSION DEADLINE:

May 18, 2021 @ 2:00PM

PROPOSAL NUMBER:

50012-490-21

DEPARTMENT

Administration & Facilities

**PRICE MUST BE FIRM FOR AT LEAST  
30 DAYS FROM OPENING DATE**

DELIVERY IN  DAYS

TERMS

**PROPOSER AGREES TO  
COMPLY WITH ALL  
CONDITIONS BELOW AND  
ATTACHED TO THIS  
REQUEST.**

Prices are to be complete and the FOB  
point to be Louisiana Tech University  
unless otherwise specified.

Typed or Printed Name

Authorized Signature/Title

ITEM:	COMPLETE SPECIFICATIONS	QTY. & UNIT:	UNIT PRICE:	AMOUNT:
1	<p>Louisiana Tech University's Administration and Facilities Department is now requesting proposals on behalf of Louisiana Tech University, University of New Orleans, and Southeastern Louisiana University for the following:</p> <p>Consulting Services for Implementation of Workday Students</p> <p><b>**Please See Attached Proposal Specifications**</b></p> <p>For questions or more information, please contact Samuel Wallace at (318) 257-2769 or wallace@latech.edu.</p>			

**IMPORTANT:** If proposing other than requested brand and product number (or style), enclose sufficient literature to determine compliance with specifications. Failure to comply with this request may eliminate your proposal from consideration. Any manufacturer's names, trade names, brand names, or catalog numbers used in the specifications are for the purpose of describing and establishing general quality levels. Such references or not intended to be restrictive. Proposals will be considered for any brand which meets or exceeds the quality of the specifications listed for any item.





**REQUEST FOR PROPOSALS**

**for**

**CONSULTING SERVICES FOR IMPLEMENTATION OF  
WORKDAY STUDENT**



**RFP #: 50012-490-21**  
**Proposal Due Date/Time: 2:00 p.m., May 18, 2021**

**State of Louisiana**

**UNIVERSITY OF LOUISIANA SYSTEM**  
**(Louisiana Tech University, University of New Orleans, Southeastern Louisiana University)**

**March 26, 2021**

## Table of Contents

PART 1: ADMINISTRATIVE AND GENERAL INFORMATION .....	6
1.1 Purpose .....	6
1.2 Background .....	6
1.3 Goals and Objectives.....	7
1.4 Term of Contract.....	8
1.5 Definitions .....	9
1.6 Schedule of Events .....	10
1.7 Proposal Submittal.....	10
1.8 Qualification for Proposer.....	11
1.8.1 Mandatory Qualifications: .....	11
1.8.2 Desirable Qualifications: .....	12
1.9 Proposal Response Format .....	12
1.9.1 Cover Letter.....	12
1.9.2 Table of Contents .....	12
1.9.3 Executive Summary.....	12
1.9.4 Company Background and Experience .....	13
1.9.5 Approach and Methodology .....	13
1.9.6 Proposed Staff Qualifications.....	15
1.9.7 Veteran and Hudson Initiative Programs Participation .....	17
1.9.8 Cost Proposal .....	19
1.9.9 Certification Statement.....	19
1.9.10 Outsourcing of Key Internal Controls:.....	19
1.10 Number of Copies of Proposals .....	19
1.11 Technical and Cost Proposals.....	20
1.12 Legibility/Clarity .....	20
1.13 Confidential Information, Trade Secrets, and Proprietary Information .....	20
1.14 Proposal Clarifications Prior to Submittal .....	21
1.14.1 Pre-proposal Conference .....	21
1.14.2 Proposer Inquiries .....	21
1.14.3 Blackout Period .....	22
1.15 Error and Omissions in Proposal .....	23

1.16	Changes, Addenda, Withdrawals .....	23
1.17	Withdrawal of Proposal .....	23
1.18	Waiver of Administrative Informalities.....	24
1.19	Proposal Rejection/RFP Cancellation.....	24
1.20	Ownership of Proposal.....	24
1.21	Cost of Offer Preparation.....	24
1.22	Taxes .....	24
1.23	Determination of Responsibility .....	25
1.24	Use of Subcontractors.....	25
1.25	Written or Oral Discussions/Presentations .....	25
1.26	Acceptance of Proposal Content.....	25
1.27	Evaluation and Selection.....	26
1.28	Best and Final Offers (BAFO).....	26
1.29	Contract Award and Execution .....	26
1.30	Notice of Intent to Award .....	26
1.31	Right to Prohibit Award.....	27
1.32	Insurance Requirements for Contractors .....	27
1.32.1	Contractor's Insurance .....	27
1.32.2	Minimum Scope and Limits of Insurance .....	27
1.32.3	Deductibles and Self-Insured Retentions.....	29
1.32.4	Other Insurance Provisions .....	29
1.32.5	Acceptability of Insurers .....	30
1.32.6	Verification of Coverage.....	30
1.32.7	Subcontractors .....	31
1.32.8	Workers Compensation Indemnity.....	31
1.33	Indemnification and Limitation of Liability .....	31
1.34	Payment .....	32
1.34.1	Electronic Vendor Payment Solutions.....	33
1.35	Termination.....	33
1.35.1	Termination of the Contract for Cause .....	33
1.35.2	Termination of the Contract for Convenience.....	33
1.35.3	Termination for Non-Appropriation of Funds.....	34
1.36	Assignment.....	34

1.37	Right to Audit .....	34
1.38	Civil Rights Compliance .....	34
1.39	Record Ownership.....	35
1.40	Entire Agreement/ Order of Precedence.....	35
1.41	Contract Modifications .....	35
1.42	Substitution of Personnel .....	35
1.43	Governing Law .....	35
1.44	Claims or Controversies .....	35
1.45	Code of Ethics.....	36
1.46	Corporate Requirements .....	36
1.47	Prohibition of Discriminatory Boycotts of Israel.....	36
PART 2: SCOPE OF WORK/SERVICES .....		37
2.1	Scope of Work.....	37
2.2	Task and Services .....	38
2.3	Deliverables.....	38
2.4	Technical Requirements.....	38
2.5	Project Requirements .....	38
PART 3: EVALUATION .....		42
3.1	Cost Evaluation .....	43
3.2	Veteran-Owned and Service-Connected Disabled Veteran-Owned Small Entrepreneurships (Veteran Initiative) and Louisiana Initiative for Small Entrepreneurships (Hudson Initiative) Programs Participation.....	44
PART 4: PERFORMANCE STANDARDS .....		45
4.1	Performance Measurement/Evaluation/Monitoring Plan .....	45
4.1.1	Performance Measures/Evaluation: .....	45
4.1.2	Monitoring Plan: .....	45
4.2	Veteran and Hudson Initiative Programs Reporting Requirements .....	45
ATTACHMENT I: CERTIFICATION STATEMENT .....		46
ATTACHMENT II: SAMPLE CONTRACT.....		48
ATTACHMENT III: CONTRACTOR PERSONNEL AND OTHER RESOURCES .....		64
ATTACHMENT IV: FUNCTIONAL DESCRIPTIONS OF MODULES .....		70
ATTACHMENT V: SCHEDULE OF INTEGRATIONS.....		80
ATTACHMENT VI: DATA CONVERSION SCOPE .....		88
ATTACHMENT VII: COST PROPOSAL WORKSHEET .....		90

ATTACHMENT VIII: STAFF ROLES, RESPONSIBILITIES, SKILL AND EXPERIENCE .....	92
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# **REQUEST FOR PROPOSAL FOR CONSULTING SERVICES FOR IMPLEMENTATION OF WORKDAY STUDENT**

## **PART 1: ADMINISTRATIVE AND GENERAL INFORMATION**

### **1.1 Purpose**

The purpose of this Request for Proposal (RFP) is to obtain competitive proposals from qualified Proposers who are interested in providing services necessary to deploy Workday Student at three universities within the University of Louisiana (UL) System.

### **1.2 Background**

Three (3) Universities in the University of Louisiana System, (Louisiana Tech University, University of New Orleans and Southeastern Louisiana University) have purchased and are implementing the Workday ERP System.

Louisiana Tech University, located in Ruston with a Fall 2020 enrollment of 11,271, will be transitioning to Workday from a legacy mainframe system. Louisiana Tech offers students an unparalleled educational experience, and the University has been recognized as one of America's Top Colleges in Forbes and as the No. 1 college in the state of Louisiana for value in Kiplinger's. The University has been ranked as a Top Tier research university in US News and World Report for 10 years, and is the only university in the state of Louisiana to be recognized in the Times Higher Education (THE) 2021 University Impact Rankings for its commitment to sustainable development.

The University has a history of and commitment to creating programs that are the first in their fields, like biomedical and cyber engineering. Louisiana Tech's partnerships with business, government and the military help create both academic programs and job development in the I-20 Cyber Corridor.

Louisiana Tech is an economic driver for its region and state. The campus is a home for new and growing enterprises. This connection to innovation impacts its academic programs and provides job opportunities for its students in fields like cyber engineering.

The University of New Orleans, located on the southern shore of Lake Ponchartrain, only fifteen (15) minutes from the French Quarter, occupies a one hundred ninety-five (195) acre campus. UNO, which has a Fall 2020 enrollment of 8,375, will be transitioning to Workday from Peoplesoft. The University has been classified by the Carnegie Foundation as a Research University (high research activity), one of fewer than one hundred (100) public universities that holds this prestigious designation.

For six (6) straight years, UNO has appeared on U.S. News & World Report's least debt list (schools whose graduates have the least amount of debt) among national universities. Over \$41 million dollars in



financial aid and scholarships are awarded annually to UNO students. Financial assistance is awarded to nearly seventy-seven (77) percent of its students. The UNO School of Naval Architecture and Marine Engineering is the only one in the region and one of only several in the nation.

Southeastern Louisiana University, located in Hammond, with an enrollment of 14,461 will be transitioning to Workday from PeopleSoft. Southeastern Louisiana University is the third largest public university in the state of Louisiana.

Southeastern Louisiana University has earned three rankings from U.S. News and World Report. The university was again named among the top universities in the region as one of the top fifty (50) public schools and one of the top one hundred (100) universities (private or public) in the South, as well as one of the top national performers for the social mobility of its students.

Two (2) Southeastern Louisiana University online nursing programs have earned recognition as the top programs in the nation by NPSchools.com, an online resource for prospective students interested in the nurse practitioner field. Southeastern Louisiana University's online doctor of nursing practice program has earned recognition as one of the top fifty (50) programs in the nation by Healthcare-Management-Degree.net.

The Workday Financial Management and Human Capital Management implementation has been implemented as of December, 2020. The implementation and completion of these modules is a prerequisite for the implementation of Workday Student.

Workday Student has been procured and the three (3) Universities have begun advanced discovery and are preparing for implementation in the summer of 2023.

This RFP is to obtain consulting services of a Workday certified Partner with specific experience in implementation of Workday Student.

### **1.3 Goals and Objectives**

Louisiana Tech University, The University of New Orleans and Southeastern Louisiana University seek to implement Workday Student, which will integrate with other Workday components and integrate with third party software.

Consulting services are needed to integrate all segments of Workday Student. Implementation will occur in a phased student cycle beginning with Student Recruiting. A master terms and conditions contract will be executed with the University of Louisiana System. Each participating University will execute a separate contract with the successful proposer from this RFP.

The following key project assumptions should be taken into consideration when responding to this RFP:

- The Workday project is a high priority of the UL System and the three participating Universities, with corresponding commitment and support by all levels of management to include timely consensus and deadline-based decisions.
- The three (3) participating Universities are committed to changing business processes and requirements, and expect to use Workday delivered Business Processes as the starting point for design/configuration activities. Deviation from the delivered business processes will not be an arbitrary action on the part of the System.
- The System will establish a project management team with appropriate levels of authority and project status reporting.
- There will be System representatives and Contractor leads for each major functional and technical area identified within the project organization.
- The UL System and the three participating Universities will commit sufficiently skilled staff resources to the Project as reflected in an agreed upon work plan and staffing plan.
- The Contractor will provide a tool for web collaboration and meetings for the project. The Contractor will use this tool and any other enabling technology for effective engagement of Subject Matter Experts(SME) across all institutions and for minimization of travel expenses.
- The three (3) participating institutions can reach agreement on critical decisions such as business process configuration and whether gaps in functionality can be addressed through other means than software extensions.
- All existing systems will continue to operate as required throughout the deployment period.
- The Contractor will commit expert resources to meet the Project timeline, post-implementation support, and knowledge transfer.

Full testing, integration and implementation must be specific, measurable, attainable, realistic, and time limited and must be completed in a three (3) year cycle.

As part of its best value approach, the UL System and three (3) universities will look to reduce project costs during the implementation. An additional cost saving factor will be the coordination and alignment of best practices. All Universities will have representation on design and configuration activities; sharing resources in design, configuration, change management, testing, and training will allow to save on costs,

#### **1.4 Term of Contract**

The term of any contract resulting from this RFP is expected to begin on or about July 31, 2021 and is anticipated to end on December 31, 2024. The State shall have the right to contract for up to thirty-six (36) months with the concurrence of the Contractor and all appropriate approvals. With all proper approvals and concurrence with the successful Contractor, agency may also exercise an option to extend for up to twenty-four (24) additional months at the same rates, terms and conditions of the initial contract term. Prior to the extension of the contract beyond the initial thirty-six (36) month term, prior approval

by the Joint Legislative Committee on the Budget (JLCB) or other approval authorized by law shall be obtained. Such written evidence of JLCB approval shall be submitted, along with the contract amendment to the Office of State Procurement (OSP) to extend contract terms beyond the initial thirty-six (36) month term. The total contract term, with extensions, shall not exceed sixty (60) months. The continuation of the contract is contingent upon the appropriation of funds by the legislature to fulfill the requirements of the contract.

## 1.5 Definitions

Agency	Any department, commission, council, board, office, bureau, committee, institution, agency, government, corporation, or other establishment of the executive branch of this state authorized to participate in any contract resulting from this solicitation.
Change Management Team	The Change Management Team will oversee the organizational change management, communication and training needs of end-users.
Contractor	Any person having a contract with a governmental body; the selected Proposer.
Discussions	For the purposes of this RFP, a formal, structured means of conducting written or oral communications/presentations with responsible Proposers who submit proposals in response to this RFP.
Functional Team	The Functional Team is comprised of subject matter experts that will be responsible for the development, standardization and/or configuration, and testing of business processes.
DOA	Division of Administration
May and Can	The terms “may” and “can” denote an advisory or permissible action.
Must	The term “must” denotes mandatory requirements.
Third Party Software	Software purchased and licensed from vendors other than Workday.
OSP	Office of State Procurement
Project Coordinator	A designated employee from each University that is the liaison between University staff and the Project Manager.
Project Manager	The primary project manager provided by the Contractor and will work with Project Coordinator from each University.
Project Sponsors	Composed of representatives from each University will be responsible for executive communications on project related matters, providing executive input to the Project Management, and setting the high-level strategy for the project. The Sponsors will negotiate and determine availability of project resources as required.
Proposer	A firm or individual who responds to this RFP.
RFP	Request for Proposal
Technical Team	The Technical Team is comprised of subject matter experts that for all integrations, interfaces, data conversions, custom reports and similar technical items agreed in the Statement of Work.
Shall and Will	The terms “shall” and “will” denote mandatory requirements.
Should	The term “should” denotes a desirable action.

State	The State of Louisiana, University of Louisiana System, or each of the participating universities (Louisiana Tech University, University of New Orleans, Southeastern Louisiana University).
Steering Committee	Composed of representatives from the UL System and each University that will be responsible for executive communications on project-related matters, providing input to Project Management, disseminating project information within their organizations, and advocating for the implementation of approved standardized business processes and data across all institutions. The Steering Committee will approve all significant modifications to designed business processes and other significant changes to the system as delivered.
System	University of Louisiana System
Workday Certified Partner	A company certified by Workday and trained extensively on Workday products as well as on the tools and methods that enable fast, efficient deployment and ongoing adoption of new capabilities.

## 1.6 Schedule of Events

<u>Event</u>	<u>Date</u>
RFP advertised in newspapers and post to LaPac	March 26, 2021
Pre-proposal conference (if applicable) via Zoom	April 12, 2021, 10:00 a.m.
Deadline for receipt of written inquiries	April 19, 2021
Deadline to answer written inquiries	May 7 2021
Deadline for receipt of proposals  ALL PROPOSALS SHALL REMAIN SEALED UNTIL THE DATE AND TIME LISTED.	2:00 p.m., May 18, 2021
Presentations & Discussions (if applicable)	May 26, 2021, at discretion of UL System
Notice of Intent to award announcement, and 14-day protest period begins, on or about	May 28 , 2021
Contract execution, on or about	June 16 , 2021

**NOTE: The State of Louisiana reserves the right to revise this schedule. Revisions, if any, before the Proposal Submission Deadline will be formalized by the issuance of an addendum to the RFP.**

## 1.7 Proposal Submittal

Firms or individuals who are interested in providing services requested under this RFP must submit a proposal containing the mandatory information specified in the section.

The proposal must be received either electronically or in hard copy (printed) version on or before the date and time specified in the Schedule of Events, according to the following instructions.

### **1.7.1. Electronic Proposal Submission**

The proposal must be uploaded to:

<https://stateofla.app.box.com/f/5d7f87630390477ab829973fe8b67432> before the date and time specified in the Schedule of Events. Uploaded submissions are the only acceptable method of electronic proposal delivery. Proposers uploading their proposals should allow sufficient time to ensure successful upload of their proposal by the time specified. Proposers are strongly encouraged to upload their proposal well in advance of the Deadline for receipt of electronic proposals as internet connectivity and file size will affect proposal submission upload timeframes.

The State assumes no liability for assuring accurate/complete uploads. The responsibility solely lies with each Proposer to ensure their proposal is successfully uploaded prior to the deadline for submission. Corrupted files and incomplete submissions will not be considered.

Proposers needing assistance regarding proposal uploads should visit:

<https://www.doa.la.gov/osp/PC/agencies/UploadingRFPproposal-viaBoxSubmissionLink.pdf>.

1.7.2 For Hard Copies: The proposal must be received in hard copy (printed) version by the RFP Coordinator on or before the date and time specified in the Schedule of Events. FAX or e-mail submissions shall not be acceptable. Proposers mailing their proposals should allow sufficient mail delivery time to ensure receipt of their proposal by the time specified. The proposal package must be delivered at the Proposer's expense to: : Samuel G. Wallace, Louisiana Tech University, P.O. Box 3157, Ruston, LA, 71272.

For courier delivery, the street address is 208 Keeny Circle Rm 408 Keeny Hall, Louisiana Tech University, Ruston, LA, and the telephone number is (318) 257-2769. The responsibility solely lies with each Proposer to ensure their proposal is delivered at the specified place and prior to the deadline for submission. Proposals received after the deadline will not be considered.

**NOTE: HARD COPIES OF PROPOSALS MUST BE DELIVERED DURING OFFICE HOURS: (8:00 a.m. to 5:00 p.m.).**

## **1.8 Qualification for Proposer**

### **1.8.1 Mandatory Qualifications:**

Proposers must meet the following qualifications prior to the deadline for receipt of proposals.

- Shall be a Workday Certified Services Partner .
- Shall have successfully completed a minimum of one (1) Implementation of Workday Student in a University environment.

Proposer shall provide documentation supporting that its record of experience meets these mandatory qualifications.

The State reserves the right to request additional information and documentation to support that the Mandatory Qualifications were met by the Proposer prior to the deadline for receipt of proposals.

#### **1.8.2 Desirable Qualifications:**

It is desirable that Proposers should meet the following qualifications prior to the deadline for receipt of proposals.

- Should have successfully completed more than one implementation of Workday Student in a University environment.
- The Proposer should show that its staff has the experience to execute all activities and provide all resources necessary to assist the universities with the desired implementations within the requested time frame.
- Proposer(s) staff should meet the qualifications listed in Staff Roles & Responsibilities prior to the deadline for receipt of proposals.

#### **1.9 Proposal Response Format**

Proposals submitted for consideration should follow the format and order of presentation described below:

##### **1.9.1 Cover Letter**

A cover letter should be submitted on the Proposer's official business letterhead explaining the intent of the Proposer.

##### **1.9.2 Table of Contents**

The proposal should be organized in the order contained below.

##### **1.9.3 Executive Summary**

This section serves to introduce the scope of the proposal. It should include administrative information including Proposer contact name and phone number, and the stipulation that the proposal is valid for a time period of at least ninety (90) calendar days from the date of submission. This section should also include a summary of the Proposer's qualifications and ability to meet the State agency's overall requirements in the timeframes set by the agency.

The executive summary should include a positive statement of compliance with the contract terms, see Sample Contract, Attachment II. If the Proposer cannot comply with any of the contract terms, an explanation of each exception should be supplied. The Proposer should address the specific language in



the Sample Contract, Attachment II and submit whatever exceptions or exact contract modifications that its firm may seek. While final wording will be resolved during contract negotiations, the intent of the provisions will not be substantially altered.

#### **1.9.4 Company Background and Experience**

The Proposers should give a brief description of their company including brief history, corporate or organization structure, number of years in business, and copies of its latest financial statement, preferably audited.

This section should provide a detailed discussion of the Proposer's prior experience in working on projects similar in size, scope, and function to the proposed contract, as described in RFP Part 2, Scope of Work. Proposers should describe their experience in other states or in corporate and governmental entities of comparable size and diversity with references from previous clients including names and telephone numbers.

Proposers should clearly describe their ability to exceed the qualifications described in the Mandatory Qualifications for Proposer section.

Proposers should clearly describe their ability to exceed the desired qualifications described in the Desirable Qualifications for Proposer section.

#### **1.9.5 Approach and Methodology**

The Proposer should describe how it will provide all services necessary to deploy Workday Student at the three(3) institutions described herein. Proposer should advise its approach and methodology to design and lead a project that shall accommodate the complexities of the three (3) Universities. All phases of the project will require representation from each of the three institutions, so that each has input in the system design.

As part of its best value approach, the UL System and three universities will look to reduce project costs during the implementation. One major cost saving factor will be the use of technology to use time more efficiently and reduce travel costs for staff and consultants. Because the institutions are distributed across the state, the UL System and the three (3) universities are expecting that web collaboration/meeting tools and other enabling technology will be used extensively during the project. The Proposer should describe its method for providing a web-based collaboration/meeting tool for the use of the project. With the use of technology, many activities could be done off-site, and that approach is acceptable.

Another cost saving factor will be the coordination and alignment of best practices. All Universities will have representation on design and configuration activities; sharing resources in design, configuration, change management, testing, and training will allow to save on costs. The Proposer should provide expert guidance and direction to eliminate complex processes when needed and assist in the adoption of common business processes for the three Universities.

Proposals should include enough information to satisfy evaluators that the Proposer has the appropriate experience, knowledge and qualifications to perform the scope of services as described in Part 2, Scope of Work. Proposer should communicate its understanding of the services required and how its proposal will meet the needs of the universities.

Information contained in Functional Descriptions (Attachment IV), the Schedule of Integrations (Attachment V) and the Data Conversion Scope (Attachment VI) should be factored into proposer's response to its approach. University resources will participate in design sessions and assist in communication with third party vendors for all integrations. University teams will be responsible for extraction of data from legacy systems to conform to tools provided by proposer. University teams will be responsible for data clean-up in legacy systems required for data loads and data validation activities.

**Schedule Requirements.** The System is presenting its target implementation dates in this section, and requests the Proposer to propose its recommendations for a more precise implementation timeline based on its experience with similar implementations of this size and complexity. The proposed timeline should be based on the following targets:

- The System expects to initiate the implementation project in Summer of 2021.
- The System is looking to the Proposer for a recommendation regarding go-live dates by function.
- The Proposer shall propose production dates by functional area based on their experience and best practices. The proposer should clearly disclose any assumptions and/or requirements that would impact proposed dates.
- Proposer shall propose completion of phases per schedule defined below. Dates of completion may be modified per proposal and contract negotiation.

	Go Live Date
Academic Foundation	Fall 2022
Recruiting	Fall 2022
Admissions	Fall 2022
Financial Aid	Spring 2023
Student Records	Spring 2023
Student Advising	Spring 2023
Student Financials	Fall 2023

Proposers should respond to all requested areas.

- Provide Proposer's understanding of the nature of the project and how its proposal will best meet the needs of the Universities.
- Define its functional approach in providing the services.
- Define its functional approach in identifying the tasks necessary to meet requirements.
- Describe the approach to Project Management and Delivery Assurance.

- Provide a proposed Project Work Plan that reflects the approach and methodology, tasks and services to be performed, deliverables, timetables, and staffing.
- Present innovative concepts for consideration.
- Define its functional approach in developing a detailed design reflecting the most effective means of accomplishing system functions within the agency's existing infrastructure.
- Define its strategy for project team organization and task assignments to transfer application knowledge, to position the State to be self-sufficient after implementation.
- Define its approach for defining system and data security.
- Identify areas of project risk and procedures to mitigate these risks.
- Define the methodology to be used for system design.
- Explain how each task and service will be performed (this should take into account project phasing, use of tools, technologies, etc.).
- Provide the activities and percentage usage for off-site or remote work. Recommendation regarding go-live dates by function.
- Propose production dates by functional area based on their experience and best practices.
- The proposer should clearly disclose any assumptions and/or requirements that would impact proposed dates.
- Propose any recommended adjustments to the anticipated Project Governance and Organization Structure presented in Part 2, Scope of Work.

The Proposer needs to make and disclose reasonable assumptions regarding the overall scope of the project, and present an overall plan and cost model for the entire project as part of its response.

#### 1.9.6 **Proposed Staff Qualifications**

The Proposer should provide detailed information about the experience and qualifications of the Proposer's assigned personnel considered key to the success of the project. Proposers should describe how it will provide the services in the Scope of Work, including but not limited to, Project Management services, Technical Team and Change Management services. This information should include education, training, technical experience, functional experience, specific dates and names of employers, relevant and related experience, past and present projects with dates and responsibilities and any applicable certifications. This should also specifically include the role and responsibilities of each person on this project, their planned level of effort, their anticipated duration of involvement, and their on-site availability. Customer references (name, title, company name, address, and telephone number) should be provided for the cited projects in the individual resumes.

#### 1.9.7 **Staff Roles & Responsibilities**

Proposer(s) should address how they will staff their teams based on the following key project roles and advise the level of commitment for the Contract term. Resumes should clearly show the desired skills and experience for the proposed key personnel to be assigned to this project, including those of subcontractor(s), if any:

<b>Role</b>	<b>Description</b>
Project Director	Provides direction to deployment team and manages critical deliverables, milestones, issues and project risks. The Project Director assists in managing executive stakeholder engagement and participates in Steering Committee meetings.
Engagement Manager	Guides the Workday Student deployment team in using the Workday Student deployment methodology. The Engagement Manager is responsible for the project plan, staffing of resources, execution of tasks, budget adherence, and management of project risks and resolution of issues that arise.
Senior Consultant	Responsible for the architecture and support of consultants for workstreams of Workday Student. The architect will provide guidance and assistance during configuration and design sessions in accordance to scope and requirements.
Functional Consultant(s)	Responsible for functional and technical project activities and providing guidance on the deployment of Workday Student. Functional consultants lead workshops to assist in the understanding and utilization of the features and functions of Workday Student. Consultants will guide University teams to design processes, gather functional, integration and reporting requirements, and map current data to Workday Student. The consultants are responsible for configuration of Workday according to requirements, and for providing support through all project stages (Architect, Configure and Prototype, Test, and Deploy).
Integrations Developer(s)	Build and configure integrations in-scope for the project in accordance to configuration requirements set by Functional Consultants and University teams. The Integrations consultants participate in all stages of the project and are responsible for the support of integration testing activities.
Data Conversion Consultant(s)	Responsible for assisting in the conversion strategy and execution of data loads. Data Conversion consultants will work with Functional Consultants, IT teams at the institutions, and business analysts in the mapping of data according to configuration requirements set by the project team. Data Conversion Consultants assist in the resolution of data related issues and guide the institution teams in the use of best practices in the preparation of the data for loading into Workday.
Delivery Assurance Consultants	Responsible for conducting reviews at the completion of every major milestone of all deliverables in scope.

**A full list of staff roles, responsibilities, and experience requirements can be found in Attachment VIII: Staff Roles, Responsibilities, Skill, and Experience.**

#### 1.9.8 Veteran and Hudson Initiative Programs Participation

The State of Louisiana Veteran and Hudson Initiatives are designed to provide additional opportunities for Louisiana-based small entrepreneurship (sometimes referred to as LaVet's and SE's respectively) to participate in contracting and procurement with the State. A certified Veteran-Owned and Service-Connected Disabled Veteran-Owned small entrepreneurship (LaVet) and a Louisiana Initiative for Small Entrepreneurships (Hudson Initiative) small entrepreneurship are businesses that have been certified by the Louisiana Department of Economic Development. All eligible vendors are encouraged to become certified. Qualification requirements and online certification are available at:

<https://smallbiz.louisianaeconomicdevelopment.com>.

If a Proposer is not a certified small entrepreneurship as described herein, but plans to use certified small entrepreneurship(s), Proposer shall include in their proposal the names of their certified Veteran Initiative or Hudson Initiative small entrepreneurship subcontractor(s), a description of the work each will perform, and the dollar value of each subcontract.

During the term of the contract and at expiration, the Contractor will also be required to report Veteran-Owned and Service-Connected Disabled Veteran-Owned and Hudson Initiative small entrepreneurship subcontractor or distributor participation and the dollar amount of each.

In RFP's requiring the compliance of a good faith subcontracting plan, the State may require Proposers to submit information on their business relationships and arrangements with certified LaVet or Hudson Initiative subcontractors at the time of proposal review. Agreements between a Proposer and a certified LaVet or Hudson Initiative subcontractor in which the certified LaVet or Hudson Initiative subcontractor promises not to provide subcontracting quotations to other Proposers shall be prohibited.

If performing its evaluation of proposals, the State reserves the right to require a non-certified Proposer to provide documentation and information supporting a good faith subcontracting plan. Such proof may include contracts between Proposer and certified Veteran Initiative and/or Hudson Initiative subcontractor(s).

If a contract is awarded to a Proposer who proposed a good faith subcontracting plan, the using agency, the Louisiana Department of Economic Development (LED), or the Office of State Procurement (OSP) may audit Contractor to determine whether Contractor has complied in good faith with its subcontracting plan. The Contractor must be able to provide supporting documentation (i.e., phone logs, fax transmittals, letter, e-mails) to demonstrate its good faith subcontracting plan was followed. If it is determined at any time by the using agency, LED, or the OSP Director that the Contractor did not in fact perform in good faith its subcontracting plan, the contract award or the existing contract may be terminated.

The statutes (La. R.S. 39:2171 *et. seq.*) concerning the Veteran Initiative may be viewed at:

<http://www.legis.la.gov/Legis/Law.aspx?d=671504>.

The statutes (La. R.S. 39:2001 *et. seq.*) concerning the Hudson Initiative may be viewed at:

<http://www.legis.la.gov/Legis/Law.aspx?d=96265>.

The rules for the Veteran Initiative (LAC 19:VII. Chapters 11 and 15) and for the Hudson Initiative (LAC 19:VIII Chapters 11 and 13) may be viewed at:

<http://www.doa.la.gov/pages/osp/se/secv.aspx>.

A current list of certified Veteran-Owned and Service-Connected Disabled Veteran-Owned and Hudson Initiative small entrepreneurships may be obtained from the Louisiana Economic Development Certification System at: <https://smallbiz.louisianaeconomicdevelopment.com>

Additionally, a list of Hudson and Veteran Initiative small entrepreneurships, which have been certified by the Louisiana Department of Economic Development and who have opted to register in the State of Louisiana LaGov Supplier Portal:

[https://lagoverpvendor.doa.louisiana.gov/irj/portal/anonymous?guest\\_user=self\\_reg](https://lagoverpvendor.doa.louisiana.gov/irj/portal/anonymous?guest_user=self_reg).

This may be accessed from the State of Louisiana Procurement and Contract (LaPAC) Network:

<https://wwwcfprd.doa.louisiana.gov/OSP/LaPAC/vendor/VndPubMain.cfm>.

When using this site, determine the search criteria (i.e. alphabetized list of all certified vendors, by commodities, etc.) and select Smalle, VSE, or DVSE.



#### 1.9.9 Cost Proposal

The Proposer shall use Attachment VII, Cost Proposal Worksheet, to provide all pricing and to be considered for award.

The UL System requests two billing rates for each job category proposed:

ON-SITE rate that is all-inclusive of travel for on-site consulting work. The Proposer shall provide fully burdened hourly rates, including but not limited to travel and project expenses requirements to the State's facility.

REMOTE/OFF\_SITE rate that includes no travel and will be used when consultants are working remotely.

The Proposer shall propose the number of hours by job category and location to complete each phase indicated in the Worksheet. The Proposer shall multiply the number of hours by the applicable hourly rates to provide the total cost for providing all services described in the RFP.

Total Cost must be proposed for providing all required services at all three named institutions.

#### 1.9.10 Certification Statement

The Proposer must sign and submit Attachment I, the Certification Statement.

#### 1.9.11 Outsourcing of Key Internal Controls:

Not applicable to this RFP.

### 1.10 Electronic and Hard Copy Proposals

For **electronic proposal submission**, the State requests that one (1) copy of the entire proposal be submitted. The proposal shall contain electronic signatures or scans of original signatures of those company officials or agents who are duly authorized to sign proposals or contracts on behalf of the organization. An electronic signature as provided by LAC 4:I.701 et seq. is considered an original signature. A certified copy of a board resolution granting such authority should be submitted if the Proposer is a corporation. The proposal containing original signatures will be retained for incorporation into any contract resulting from this RFP.

For **hard copy (printed) proposal submission**, The State requests that ten (10) copies of the proposal be submitted to the RFP Coordinator at the address specified. At least one copy of the proposal shall contain original signatures of those company officials or agents duly authorized to sign proposals or contracts on behalf of the organization. A certified copy of a board resolution granting such authority should be

submitted if the Proposer is a corporation. The proposal containing original signatures will be retained for incorporation into any contract resulting from this RFP. In addition to the hard copies of the proposal, one (1) complete proposal in pdf format must be provided.

#### **1.11 Technical and Cost Proposals**

The State requests the following for electronic proposal submittal:

- One (1) technical proposal in PDF and Microsoft Word formats. The file shall be named: RFP# #, Technical Proposal - [Proposer Name].
- One (1) cost proposal in PDF and Microsoft Excel formats. The file shall be named: Cost Proposal - [Proposer Name].
- One (1) redacted technical proposal, if applicable, in PDF and Microsoft Word formats. The file shall be named: Redacted Technical Proposal - [Proposer Name].

The State requests the following for hard copy(printed) proposal submissions:

- One (1) Original (clearly marked "Original") and ten (10) numbered copies of the technical proposal. All should be clearly marked technical proposal.
- One (1) Original (clearly marked "Original") and ten (10) numbered copies of the cost proposal. All should be clearly marked cost proposal.
- One (1) redacted technical proposal, if applicable.
- Two (2) USB flash drives each containing one (1) searchable electronic copy of the proposal. The searchable electronic copy should be provided as one (1) file. Each USB flash drive should also contain a searchable electronic copy of the redacted technical proposal, if applicable.

#### **1.12 Legibility/Clarity**

Responses to the requirements of this RFP in the formats requested are desirable with all questions answered in as much detail as practicable. The Proposer's response should demonstrate an understanding of the requirements. Proposals prepared simply and economically, providing a straightforward, concise description of the Proposer's ability to meet the requirements of the RFP are also desired. Each Proposer shall be solely responsible for the accuracy and completeness of its proposal.

#### **1.13 Confidential Information, Trade Secrets, and Proprietary Information**

All financial, statistical, personal, technical and other data and information relating to the State's operation which are designated confidential by the State and made available to the Contractor in order to carry out the contract, or which become available to the Contractor in carrying out the contract, shall be protected by the Contractor from unauthorized use and disclosure through the observance of the same

or more effective procedural requirements as are applicable to the State. The identification of all such confidential data and information as well as the State's procedural requirements for protection of such data and information from unauthorized use and disclosure shall be provided by the State in writing to the Contractor. If the methods and procedures employed by the Contractor for the protection of the Contractor's data and information are deemed by the State to be adequate for the protection of the State's confidential information, such methods and procedures may be used, with the written consent of the State, to carry out the intent of this paragraph. The Contractor shall not be required under the provisions of the paragraph to keep confidential any data or information which is or becomes publicly available, is already rightfully in the Contractor's possession, is independently developed by the Contractor outside the scope of the contract, or is rightfully obtained from third parties.

Under no circumstance shall the Contractor discuss and/or release information to the media concerning this project without prior express written approval of the University of Louisiana System.

Only information which is in the nature of legitimate trade secrets or non-published financial data shall be deemed proprietary or confidential. Any material within a proposal identified as such must be clearly marked in the proposal and will be handled in accordance with the Louisiana Public Records Act, R.S. 44: 1-44 and applicable rules and regulations. Any proposal marked as confidential or proprietary in its entirety shall be rejected without further consideration or recourse.

#### **1.14 Proposal Clarifications Prior to Submittal**

##### **1.14.1 Pre-proposal Conference**

A non-mandatory pre-proposal conference will be held on the date listed in the Schedule of Events, via Zoom meeting at <https://zoom.us/my/ulsworlkdlay>. The purpose of the conference shall be for Proposers to obtain clarification of the requirements of the RFP and to receive answers to relevant questions. Any firm or joint venture intending to submit a proposal should have at least one duly authorized representative attend the pre-proposal conference.

Although impromptu questions will be permitted and spontaneous answers will be provided during the conference, the only official answer or position of the State will be stated in writing in response to written questions. Potential Proposers should submit all questions in writing even if an answer has already been given to an oral question. After the conference, written questions will be researched and an official response will be posted at <https://wwwcfprd.doa.louisiana.gov/osp/lapac/pubMain.cfm>.

##### **1.14.2 Proposer Inquiries**

Written questions regarding RFP requirements or Scope of Services must be submitted by e-mail to the RFP Coordinator listed below.

[wallace@latech.edu](mailto:wallace@latech.edu)

Samuel G. Wallace, Louisiana Tech University, P.O. Box 3157, Ruston, LA, 71272

The State will consider written inquiries and requests for clarification of the content of this RFP received from potential Proposers. Written inquiries must be received by the date and time specified in the Schedule of Events. The State shall reserve the right to modify the RFP should a change be identified that is in the best interest of the State.

Official responses to all questions submitted by potential Proposers will be posted by the date specified in the Schedule of Events at <https://www.cfprd.doa.louisiana.gov/osp/lapac/pubMain.cfm>.

Only Samuel G. Wallace or his designee has the authority to officially respond to a Proposer's questions on behalf of the State. Any communications from any other individuals shall not be binding to the State.

Note: LaPAC is the State's online electronic bid posting and notification system resident on the Office of State Procurement website <http://www.doa.la.gov/Pages/osp/Index.aspx>. In that LaPAC provides an immediate e-mail notification to subscribing Bidders/Proposers that a solicitation and any subsequent addenda have been let and posted, notice and receipt thereof is considered formally given as of their respective dates of posting. To receive the e-mail notification, Vendors/Proposers must register in the LaGov portal. Registration is intuitive at the following link:  
[https://lagoverpvendor.doa.louisiana.gov/irj/portal/anonymous?guest\\_user=self\\_reg](https://lagoverpvendor.doa.louisiana.gov/irj/portal/anonymous?guest_user=self_reg).

Help scripts are available on OSP website under vendor center at:  
<http://www.doa.la.gov/Pages/osp/vendorcenter/regnhelp/index.aspx>.

#### 1.14.3 **Blackout Period**

The blackout period is a specified period of time during a competitive sealed procurement process in which any Proposer, bidder, or its agent or representative, is prohibited from communicating with any state employee or contractor of the State involved in any step in the procurement process about the affected procurement. The blackout period applies not only to state employees, but also to any contractor of the State. "Involvement" in the procurement process includes but may not be limited to project management, design, development, implementation, procurement management, development of specifications, and evaluation of proposals for a particular procurement. All solicitations for competitive sealed procurements will identify a designated contact person, as per Proposer Inquiries section of this RFP. All communications to and from potential Proposers, bidders, vendors and/or their representatives during the blackout period must be in accordance with this solicitation's defined method of communication with the designated contact person. The blackout period will begin upon posting of the solicitation. The blackout period will end when the contract is awarded.

In those instances in which a prospective Proposer is also an incumbent contractor, the State and the incumbent contractor may contact each other with respect to the existing contract only. Under no circumstances may the State and the incumbent contractor and/or its representative(s) discuss the blacked-out procurement.

Any bidder, Proposer, or state contractor who violates the blackout period may be liable to the State in damages and/or subject to any other remedy allowed by law.

Any costs associated with cancellation or termination will be the responsibility of the Proposer or bidder.

Notwithstanding the foregoing, the blackout period shall not apply to:

- A protest to a solicitation submitted pursuant to La. R.S. 39:1671;
- Duly noticed site visits and/or conferences for bidders or Proposers;
- Oral presentations during the evaluation process
- Communications regarding a particular solicitation between any person and staff of the procuring agency provided the communication is limited strictly to matters of procedure. Procedural matters include deadlines for decisions or submission of proposals and the proper means of communicating regarding the procurement, but shall not include any substantive matter related to the particular procurement or requirements of the RFP

#### **1.15 Error and Omissions in Proposal**

The State reserves the right to seek clarification of any proposal for the purpose of identifying and eliminating minor irregularities or informalities.

#### **1.16 Changes, Addenda, Withdrawals**

The State reserves the right to change the schedule of events or revise any part of the RFP by issuing an addendum to the RFP at any time. Addenda, if any, will be posted at <https://www.cfprd.doa.louisiana.gov/osp/lapac/pubMain.cfm>.

It shall be the responsibility of the Proposer to check the website for addenda to the RFP.

#### **1.17 Withdrawal of Proposal**

A Proposer may withdraw a proposal that has been submitted at any time up to the date and time the proposal is due.

To withdraw an electronically submitted proposal, a written request signed by the authorized representative of the Proposer must be submitted via the electronic submission portal.

To withdraw a hard copy(printed) proposal, a written request signed by the authorized representative of the Proposer must be submitted to the RFP coordinator identified in the RFP.

#### **1.18 Waiver of Administrative Informalities**

The State shall reserve the right, at its sole discretion, to waive minor administrative informalities contained in any proposal.

#### **1.19 Proposal Rejection/RFP Cancellation**

Issuance of this RFP in no way shall constitute a commitment by the State to award a contract. The State shall reserve the right to accept or reject, in whole or part, all proposals submitted and/or cancel this RFP if it is determined to be in the State's best interest.

#### **1.20 Ownership of Proposal**

All materials submitted in response to this RFP shall become the property of the State. Selection or rejection of a proposal shall not affect this right.

#### **1.21 Cost of Offer Preparation**

The State shall not be liable for any costs incurred by Proposers prior to issuance of or entering into a contract. Costs associated with developing the proposal, preparing for oral presentations, and any other expenses incurred by the Proposer in responding to this RFP shall be entirely the responsibility of the Proposer and shall not be reimbursed in any manner by the State.

#### **1.22 Taxes**

Contractor shall be responsible for payment of all applicable taxes from the funds to be received under contract awarded from this RFP.

In accordance with R.S. 39:1624(A)(10), the Louisiana Department of Revenue must determine that the prospective contractor is current in the filing of all applicable tax returns and reports and in payment of all taxes, interest, penalties, and fees owed to the state and collected by the Department of Revenue prior to the approval of the contract by the Office of State Procurement. The prospective contractor shall attest to its current and/or prospective compliance by signing the Certification Statement, Attachment I, submitted with its proposal, and also agrees to provide its seven-digit LDR Account Number to the contracting agency so that the prospective contractor's tax payment compliance status may be verified. The prospective contractor further acknowledges understanding that issuance of a tax clearance certificate by the Louisiana Department of Revenue is a necessary precondition to the approval and effectiveness of the contract by the Office of State Procurement. The contracting agency reserves the right to withdraw its consent to the contract without penalty and proceed with alternate arrangements should the vendor fail to resolve any identified apparent outstanding tax compliance discrepancies with the Louisiana Department of Revenue within seven (7) days of such notification.



### **1.23 Determination of Responsibility**

Determination of the Proposer's responsibility relating to this RFP shall be made according to the standards set forth in LAC 34:2536. The State must find that the selected Proposer:

- Has adequate financial resources for performance, or has the ability to obtain such resources as required during performance;
- Has the necessary experience, organization, technical qualifications, skills, and facilities, or has the ability to obtain them;
- Is able to comply with the proposed or required time of delivery or performance schedule;
- Has a satisfactory record of integrity, judgment, and performance; and
- Is otherwise qualified and eligible to receive an award under applicable laws and regulations.

Proposers should ensure that their proposals contain sufficient information for the State to make its determination by presenting acceptable evidence of the above to perform the contracted services.

### **1.24 Use of Subcontractors**

The State shall have a single prime Contractor as the result of any contract negotiation, and that prime Contractor shall be responsible for all deliverables specified in the RFP and proposal. This general requirement notwithstanding, Proposers may enter into subcontractor arrangements, however, shall acknowledge in their proposals total responsibility for the entire contract.

If the Proposer intends to subcontract for portions of the work, the Proposer shall identify any subcontractor relationships and include specific designations of the tasks to be performed by the subcontractor. Information required of the Proposer under the terms of this RFP shall also be required for each subcontractor, if requested by the State. The prime Contractor shall be the single point of contact for all subcontract work.

Unless provided for in the contract with the State, the prime Contractor shall not contract with any other party for any of the services herein contracted without the express prior written approval of the State.

### **1.25 Written or Oral Discussions/Presentations**

The State, at its sole discretion, may require all Proposers reasonably susceptible of being selected for the award to provide an oral presentation of how they propose to meet the agency's program objectives. Commitments made by the Proposer at the oral presentation, if any, will be considered binding.

UL System reserves the right to adjust the original scores based upon information received in the presentation, using the original evaluation criteria. Cost score will remain the same.

### **1.26 Acceptance of Proposal Content**

Proposals will be reviewed to determine compliance with administrative and mandatory requirements as specified in the RFP. Proposals that are not in compliance will be rejected from further consideration.

### **1.27 Evaluation and Selection**

The evaluation of proposals will be accomplished by an evaluation team, to be designated by the state, which will determine the proposal most advantageous to the state, taking into consideration price and the other evaluation factors set forth in the RFP.

The evaluation team may consult subject matter expert(s) to serve in an advisory capacity regarding any Proposer or proposal. Such input may include, but not be limited to, analysis of Proposer financial statements, review of technical requirements, or preparation of cost score data.

### **1.28 Best and Final Offers (BAFO)**

The State reserves the right to conduct a BAFO with one or more Proposers identified by the evaluation committee to be reasonably susceptible of being selected for an award. If conducted, the Proposers selected will receive written notification of their selection, a list of specific items to address in the BAFO, and instructions for submittal. The BAFO negotiation may be used to assist the State in clarifying the scope of work or to obtain the most cost effective pricing available.

**The written invitation to participate in BAFO will not obligate the State to a commitment to enter into a contract.**

### **1.29 Contract Award and Execution**

The State reserves the right to enter into a contract based on the initial offers received without further discussion of the proposals submitted. The State reserves the right to contract for all or a partial list of services offered in the proposals.

The RFP, including any addenda added, and the selected proposal shall become part of the contract initiated by the State.

The selected Proposer shall be expected to enter into a contract that is substantially the same as the Sample Contract, Attachment II. A Proposer shall not submit its own standard contract terms and conditions as a response to this RFP. The Proposer should submit in its proposal any exceptions or contract deviations that its firm wishes to negotiate. Negotiations may coincide with the announcement of the selected Proposer.

If the contract negotiation period exceeds thirty (30) business days, or if the selected Proposer fails to sign the final contract within fourteen (14) business days of delivery, the State may elect to cancel the award and award the contract to the next-highest-ranked Proposer.

### **1.30 Notice of Intent to Award**

The Evaluation Team shall compile the scores and make a recommendation to the head of the University of Louisiana on the basis of the responsive and responsible Proposer with the highest score.

The State will notify the successful Proposer and proceed to negotiate terms for final contract(s). Unsuccessful Proposers will be notified in writing accordingly.

The proposals received (except for that information appropriately designated as confidential in accordance with R.S. 44.1 et seq), scores of each proposal considered along with a summary of scores, and a narrative justifying selection shall be made available, upon request, to all interested parties after the "Notice of Intent to Award" letter has been issued.

Any person aggrieved by the proposed award has the right to submit a protest in writing to the Chief Procurement Officer within fourteen (14) calendar days after the agency issues a Notice of Intent to award a contract.

The award of a contract shall be subject to the approval of the Division of Administration, Office of State Procurement.

#### **1.31 Right to Prohibit Award**

In accordance with the provisions of R.S. 39:2192, any public entity shall be authorized to reject a proposal from, or not award a contract to, a business in which any individual with an ownership interest of five percent or more, has been convicted of, or has entered a plea of guilty or nolo contendere to any state felony or equivalent federal felony crime committed in the solicitation or execution of a contract or RFP awarded under the laws governing public contracts under the provisions of Chapter 10 of Title 38 of the Louisiana Revised Statutes of 1950, and all contracts under Title 39, Chapter 17 of the Louisiana Procurement Code, including contracts for professional, personal, consulting, and social services.

#### **1.32 Insurance Requirements for Contractors**

Insurance shall be placed with insurers with an A.M. Best's rating of no less than A-: VI. This rating requirement shall be waived for Worker's Compensation coverage only.

##### **1.32.1 Contractor's Insurance**

The Contractor shall purchase and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, its agents, representatives, employees or subcontractors. The cost of such insurance shall be included in the total contract amount.

##### **1.32.2 Minimum Scope and Limits of Insurance**

#### **1.32.2.1 Workers Compensation**

Workers Compensation insurance shall be in compliance with the Workers Compensation law of the State of the Contractor's headquarters. Employers Liability is included with a minimum limit of \$1,000,000 per accident/per disease/per employee. If work is to be performed over water and involves maritime exposure, applicable LHWCA, Jones Act, or other maritime law coverage shall be included. A.M. Best's insurance company rating requirement may be waived for workers compensation coverage only.

#### **1.32.2.2 Commercial General Liability**

Commercial General Liability insurance, including Personal and Advertising Injury Liability and Products and Completed Operations, shall have a minimum limit per occurrence of \$1,000,000 and a minimum general annual aggregate of \$2,000,000. The Insurance Services Office (ISO) Commercial General Liability occurrence coverage form CG 00 01 (current form approved for use in Louisiana), or equivalent, is to be used in the policy. Claims-made form is unacceptable.

#### **1.32.2.3 Professional Liability (Errors and Omissions)**

Professional Liability (Error & Omissions) insurance, which covers the professional errors, acts, or omissions of the Contractor, shall have a minimum limit of \$1,000,000. Claims-made coverage is acceptable. The date of the inception of the policy must be no later than the first date of the anticipated work under the contract. It shall provide coverage for the duration of the contract and shall have an expiration date no earlier than 30 days after the anticipated completion of the contract. The policy shall provide an extended reporting period of not less than 36 months from the expiration date of the policy, if the policy is not renewed.

#### **1.32.2.4 Automobile Liability**

Automobile Liability Insurance shall have a minimum combined single limit per accident of \$1,000,000. ISO form number CA 00 01 (current form approved for use in Louisiana), or equivalent, is to be used in the policy. This insurance shall include third-party bodily injury and property damage liability for owned, hired and non-owned automobiles.

#### **1.32.2.5 Cyber Liability**

Cyber liability insurance, including first-party costs, due to an electronic breach that compromises the State's confidential data shall have a minimum limit per occurrence of \$1,000,000. Claims-made coverage is acceptable. The date of the inception of the policy must be no later than the first date of the anticipated work under the contract. It shall provide coverage for the duration of the contract and shall have an expiration date no earlier than 30 days after the anticipated completion of the contract. The policy shall provide an extended reporting period of not less than 36 months from the expiration date of the policy, if the policy is not renewed. The policy shall not be cancelled for any reason, except non-payment of premium.

### **1.32.3 Deductibles and Self-Insured Retentions**

Any deductibles or self-insured retentions must be declared to and accepted by the Agency. The Contractor shall be responsible for all deductibles and self-insured retentions.

### **1.32.4 Other Insurance Provisions**

The policies are to contain, or be endorsed to contain, the following provisions:

#### **1.32.4.1 Commercial General Liability, Automobile Liability, and Cyber Liability Coverages**

The Agency, its officers, agents, employees and volunteers shall be named as an additional insured as regards negligence by the Contractor. ISO Forms CG 20 10 (for ongoing work) AND CG 20 37 (for completed work) (current forms approved for use in Louisiana), or equivalents, are to be used when applicable. The coverage shall contain no special limitations on the scope of protection afforded to the Agency.

The Contractor's insurance shall be primary as respects the Agency, its officers, agents, employees and volunteers for any and all losses that occur under the contract. Any insurance or self-insurance maintained by the Agency shall be excess and non-contributory of the Contractor's insurance.

#### **1.32.4.2 Workers Compensation and Employers Liability Coverage**

To the fullest extent allowed by law, the insurer shall agree to waive all rights of subrogation against the Agency, its officers, agents, employees and volunteers for losses arising from work performed by the Contractor for the Agency.

#### **1.32.4.3 All Coverages**

All policies must be endorsed to require 30 days written notice of cancellation to the Agency. Ten-day written notice of cancellation is acceptable for non-payment of premium. Notifications shall comply with the standard cancellation provisions in the Contractor's policy. In addition, Contractor is required to notify Agency of policy cancellations or reductions in limits.

The acceptance of the completed work, payment, failure of the Agency to require proof of compliance, or Agency's acceptance of a non-compliant certificate of insurance shall not release the Contractor from the obligations of the insurance requirements or indemnification agreement.

The insurance companies issuing the policies shall have no recourse against the Agency for payment of premiums or for assessments under any form of the policies.

Any failure of the Contractor to comply with reporting provisions of the policy shall not affect coverage provided to the Agency, its officers, agents, employees and volunteers.

#### 1.32.5      **Acceptability of Insurers**

All required insurance shall be provided by a company or companies lawfully authorized to do business in the jurisdiction in which the Project is located. Insurance shall be placed with insurers with an A.M. Best's rating of **A:VI or higher**. This rating requirement may be waived for workers compensation coverage only.

If at any time an insurer issuing any such policy does not meet the minimum A.M. Best rating, the Contractor shall obtain a policy with an insurer that meets the A.M. Best rating and shall submit another Certificate of Insurance within 30 days.

#### 1.32.6      **Verification of Coverage**

Contractor shall furnish the Agency with Certificates of Insurance reflecting proof of required coverage. The Certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The Certificates are to be received and approved by the Agency before work commences and upon any contract renewal or insurance policy renewal thereafter.

The Certificate Holder shall be listed as follows:

State of Louisiana

University of Louisiana System, Louisiana Tech University, University of New Orleans, Southeastern

Louisiana University, Its Officers, Agents, Employees and Volunteers

University of Louisiana System  
1201 North Third Street  
Suite 7-300  
Baton Rouge, LA 70802

Louisiana Tech University  
P.O. Box 3168  
Ruston, LA 71272

University of New Orleans  
2000 Lakeshore Drive  
New Orleans, LA 70148

Southeastern Louisiana University  
SLU Box 10784  
Hammond, LA 70402

In addition to the Certificates, Contractor shall submit the declarations page and the cancellation provision for each insurance policy. The Agency reserves the right to request complete certified copies of all required insurance policies at any time.

Upon failure of the Contractor to furnish, deliver and maintain required insurance, the contract, at the election of the Agency, may be suspended, discontinued or terminated. Failure of the Contractor to purchase and/or maintain any required insurance shall not relieve the Contractor from any liability or indemnification under the contract.

#### **1.32.7 Subcontractors**

Contractor shall include all subcontractors as insureds under its policies OR shall be responsible for verifying and maintaining the Certificates provided by each subcontractor. Subcontractors shall be subject to all of the requirements stated herein. The Agency reserves the right to request copies of subcontractor's Certificates at any time.

#### **1.32.8 Workers Compensation Indemnity**

In the event Contractor is not required to provide or elects not to provide workers compensation coverage, the parties hereby agree that Contractor, its owners, agents and employees will have no cause of action against, and will not assert a claim against, the State of Louisiana, its departments, agencies, agents and employees as an employer, whether pursuant to the Louisiana Workers Compensation Act or otherwise, under any circumstance. The parties also hereby agree that the State of Louisiana, its departments, agencies, agents and employees shall in no circumstance be, or considered as, the employer or statutory employer of Contractor, its owners, agents and employees. The parties further agree that Contractor is a wholly independent contractor and is exclusively responsible for its employees, owners, and agents. Contractor hereby agrees to protect, defend, indemnify and hold the State of Louisiana, its departments, agencies, agents and employees harmless from any such assertion or claim that may arise from the performance of the contract.

#### **1.33 Indemnification and Limitation of Liability**

Neither party shall be liable for any delay or failure in performance beyond its control resulting from acts of God or force majeure. The parties shall use reasonable efforts to eliminate or minimize the effect of such events upon performance of their respective duties under Contract.

Contractor shall be fully liable for the actions of its agents, employees, partners or subcontractors and shall fully indemnify and hold harmless the State and its Authorized Users from suits, actions, damages and costs of every name and description relating to personal injury and damage to property caused by Contractor, its agents, employees, partners or subcontractors, without limitation; provided, however, that the Contractor shall not indemnify for that portion of any claim, loss or damage arising hereunder due to the negligent act or failure to act of the State. If applicable, Contractor will indemnify, defend and hold the State and its Authorized Users harmless, without limitation, from and against any and all damages, expenses (including reasonable attorneys' fees), claims, judgments, liabilities and costs which may be

finally assessed against the State in any action for infringement of a United States Letter Patent with respect to the Products furnished, or of any copyright, trademark, trade secret or intellectual property right, provided that the State shall give the Contractor: (i) prompt written notice of any action, claim or threat of infringement suit, or other suit, (ii) the opportunity to take over, settle or defend such action, claim or suit at Contractor's sole expense, and (iii) assistance in the defense of any such action at the expense of Contractor. Where a dispute or claim arises relative to a real or anticipated infringement, the State or its Authorized Users may require Contractor, at its sole expense, to submit such information and documentation, including formal patent attorney opinions, as the Commissioner of Administration shall require.

The Contractor shall not be obligated to indemnify that portion of a claim or dispute based upon: i) Authorized User's unauthorized modification or alteration of a Product, Material or Service; ii) Authorized User's use of the Product in combination with other products not furnished by Contractor; iii) Authorized User's use in other than the specified operating conditions and environment.

In addition to the foregoing, if the use of any item(s) or part(s) thereof shall be enjoined for any reason or if Contractor believes that it may be enjoined, Contractor shall have the right, at its own expense and sole discretion as the Authorized User's exclusive remedy to take action in the following order of precedence: (i) to procure for the State the right to continue using such item(s) or part (s) thereof, as applicable; (ii) to modify the component so that it becomes non-infringing equipment of at least equal quality and performance; or (iii) to replace said item(s) or part(s) thereof, as applicable, with non-infringing components of at least equal quality and performance, or (iv) if none of the foregoing is commercially reasonable, then provide monetary compensation to the State up to the dollar amount of the Contract.

For all other claims against the Contractor where liability is not otherwise set forth in the Contract as being "without limitation", and regardless of the basis on which the claim is made, Contractor's liability for direct damages, shall be the greater of \$100,000, the dollar amount of the Contract, or two (2) times the charges rendered by the Contractor under the Contract. Unless otherwise specifically enumerated herein or in the work order mutually agreed between the parties, neither party shall be liable to the other for special, indirect or consequential damages, including lost data or records (unless the Contractor is required to back-up the data or records as part of the work plan), even if the party has been advised of the possibility of such damages. Neither party shall be liable for lost profits, lost revenue or lost institutional operating savings.

The State and Authorized User may, in addition to other remedies available to them at law or equity and upon notice to the Contractor, retain such monies from amounts due Contractor, or may proceed against the performance and payment bond, if any, as may be necessary to satisfy any claim for damages, penalties, costs and the like asserted by or against them.

#### **1.34 Payment**

During the execution of tasks contained in the Scope of Services, the Contractor may submit invoices, not more frequently than monthly. The payment terms shall be as follows:



Payments to the Contractor for services rendered for this Project shall be based on a certified and itemized invoice showing line item costs incurred. Any labor charges for approved services shall include the names of the employees, their classification, and the time worked. These shall be reimbursed at the approved billable rate for that classification established from the Contractor's Proposal.. These rates shall be used for the duration of the Contract.

Such payment amounts for work performed must be based on at least equivalent services rendered, and to the extent practical, will be keyed to clearly identifiable stages of progress as reflected in written reports submitted with the invoices. Contractor will not be paid more than the maximum amount of the contract.

#### **1.34.1 Electronic Vendor Payment Solutions**

The State desires to make payment to the awarded Proposer(s) electronically. The method of payment may be via EFT, a method in which payment is sent directly from the State's bank to the payee's bank. Please see Attachment III for additional information regarding electronic payment methods and registration.

#### **1.35 Termination**

##### **1.35.1 Termination of the Contract for Convenience**

The State may terminate the Contract at any time without penalty by giving thirty (30) calendar days' written notice to the Contractor of such termination or negotiating with the Contractor an effective date. Contractor shall be entitled to payment for deliverables in progress, to the extent work has been performed satisfactorily.

##### **1.35.2 Termination of the Contract for Cause**

State may terminate the Contract for cause based upon the failure of the Contractor to comply with the terms and/or conditions of the Contract; provided the State shall give the Contractor written notice specifying the Contractor's failure. If within thirty (30) calendar days after receipt of such notice, the Contractor shall not have either corrected such failure or, in the case of failure which cannot be corrected in thirty (30) calendar days, begun in good faith to correct said failure and thereafter proceeded diligently to complete such correction, then the State may, at its option, place the Contractor in default and the Contract shall terminate on the date specified in such notice. Failure to perform within the time agreed upon in the contract may constitute default and may cause cancellation of the contract.

Contractor may exercise any rights available to it under Louisiana law to terminate for cause upon the failure of the State to comply with the terms and conditions of the contract provided that the Contractor shall give the State written notice specifying the State agency's failure and a reasonable opportunity for the State to cure the defect.

### **1.35.3 Termination for Non-Appropriation of Funds**

The continuation of the contract shall be contingent upon the appropriation of funds by the legislature to fulfill the requirements of the contract by the legislature. If the legislature fails to appropriate sufficient monies to provide for the continuation of the contract, or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act of Title 39 of the Louisiana Revised Statutes of 1950 to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the contract, the contract shall terminate on the date of the beginning of the first fiscal year for which funds have not been appropriated.

### **1.36 Assignment**

No Contractor shall assign any interest in the contract by assignment, transfer, or novation, without prior written consent of the State. This provision shall not be construed to prohibit the Contractor from assigning to a bank, trust company, or other financial institution any money due or to become due from approved contracts without such prior written consent. Notice of any such assignment or transfer shall be furnished promptly to the State.

### **1.37 Right to Audit**

The State legislative auditor, federal auditors and internal auditors of the University of Louisiana System, Division of Administration, or others so designated by the DOA, shall have the option to audit all accounts directly pertaining to the resulting contract for a period of five (5) years from the date of final payment or as required by applicable State and Federal law. Records shall be made available during normal working hours for this purpose.

### **1.38 Civil Rights Compliance**

The Contractor agrees to abide by the requirements of the following as applicable: Title VI of the Civil Rights Act of 1964 and Title VII of the Civil Rights Act of 1964, as amended by the Equal Employment Opportunity Act of 1972, Federal Executive Order 11246 as amended, the Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Discrimination Act of 1975, the Fair Housing Act of 1968 as amended, and Contractor agrees to abide by the requirements of the Americans with Disabilities Act of 1990.

Contractor agrees not to discriminate in its employment practices, and will render services under the contract without regard to race, color, religion, sex, sexual orientation, national origin, veteran status, political affiliation, disability, or age in any matter relating to employment. Any act of discrimination committed by Contractor, or failure to comply with these statutory obligations when applicable shall be grounds for termination of the contract.

### **1.39 Record Ownership**

All records, reports, documents, or other material related to any contract resulting from this RFP and/or obtained or prepared by the Contractor in connection with the performance of the services contracted for herein shall become the property of the State and shall, upon request, be returned by the Contractor to the State, at the Contractor's expense, at termination or expiration of the contract.

### **1.40 Entire Agreement/ Order of Precedence**

The contract, together with the RFP and addenda issued thereto by the State, the proposal submitted by the Contractor in response to the State's RFP, and any exhibits specifically incorporated herein by reference, shall constitute the entire agreement between the parties with respect to the subject matter.

In the event of any inconsistent or incompatible provisions, this signed agreement (excluding the RFP and the Contractor's proposal) shall take precedence, followed by the provisions of the RFP, and then by the terms of the Contractor's proposal.

### **1.41 Contract Modifications**

No amendment or variation of the terms of the contract shall be valid unless made in writing, signed by the parties and approved as required by law. No oral understanding or agreement not incorporated in the contract shall be binding on any of the parties.

### **1.42 Substitution of Personnel**

The Contractor's personnel assigned to the Contract shall not be replaced without the prior written consent of the State. Such consent shall not be unreasonably withheld or delayed provided an equally qualified replacement is offered. In the event that any State or Contractor personnel become unavailable due to resignation, illness, or other factors, excluding assignment to a project outside the contract, outside of the State's or Contractor's reasonable control, as the case may be, the State or the Contractor shall be responsible for providing an equally qualified replacement in time to avoid delays in completing tasks. The Contractor will make every reasonable attempt to assign the personnel listed in his proposal.

### **1.43 Governing Law**

The contract shall be governed by and interpreted in accordance with the laws of the State of Louisiana. Venue of any action brought with regard to the contract shall be in the Nineteenth Judicial District Court, Parish of East Baton Rouge, State of Louisiana.

### **1.44 Claims or Controversies**

Any claim or controversy arising out of the contract shall be resolved by the provisions of Louisiana Revised Statutes 39:1672.2-1672.4.

#### **1.45 Code of Ethics**

Proposers shall be responsible for determining that there will be no conflict or violation of the Louisiana Ethics Code if their company is awarded the contract. The Louisiana Board of Ethics shall be the only entity which can officially rule on ethics issues.

#### **1.46 Corporate Requirements**

If the Contractor is a corporation not incorporated under the laws of the State of Louisiana, the Contractor shall have obtained a certificate of authority pursuant to R. S. 12:301-302 from the Louisiana's Secretary of State. If the Contractor is a for-profit corporation whose stock is not publicly traded, the Contractor shall ensure that a disclosure of ownership form has been properly filed with the Louisiana's Secretary of State.

#### **1.47 Prohibition of Discriminatory Boycotts of Israel**

In preparing its response, the Proposer has considered all proposals submitted from qualified, potential subcontractors and suppliers, and has not, in the solicitation, selection, or commercial treatment of any subcontractor or supplier, refused to transact or terminated business activities, or taken other actions intended to limit commercial relations, with a person or entity that is engaging in commercial transactions in Israel or Israeli-controlled territories, with the specific intent to accomplish a boycott or divestment of Israel. Proposer also has not retaliated against any person or other entity for reporting such refusal, termination, or commercially limiting actions. The State reserves the right to reject the response of the Proposer if this certification is subsequently determined to be false, and to terminate any contract awarded based on such a false response.

## PART 2: SCOPE OF WORK/SERVICES

### 2.1 Scope of Work

The Contractor shall provide and schedule all services necessary to deploy Workday Student at the three (3) institutions described herein.

The Contractor shall design and lead a project that can accommodate the complexities of having -the three Universities-

All phases of the project will require representation from each of the three (3) institutions to ensure that all institutions have input in the system design.

**Project Management services:** The Contractor shall provide a Project Manager for the duration of the project, who will partner with the UL System Project Manager as the primary project manager and project coordinator for all implementation efforts. Each institution will have a project coordinator that will act as liaison between the project manager and the institution.

**Functional Team services:** The contractor will provide leadership in all functional areas, and provide sufficient resources to work with all three (3) institutions.

**Technical Team services:** The contractor will lead, manage and coordinate all Technical Team work. The Contractor shall manage all integrations, interfaces, data conversions, custom reports and similar technical items in the Statement of Work. The three (3) institutions will be responsible for some of the technical work, such as working with extracting data from legacy systems and writing simple integrations. The Contractor shall be responsible for the technical effort to analyze, design, code, test and deploy these items which shall be included in the Contractor's proposal. (integrations in scope listed in Attachment V.

**Change Management services:** These resources will be provided by the three (3) institutions respectively based on an agreed work plan.

**End User Training:** Contractor must provide a training plan and assist with direction and execution of end-user training for the System. The Contractor shall lead and provide resources for development and delivery of end-user training based on the Training Strategy and Plan. The three (3) universities' administrators shall be trained using self-paced courses delivered over the web, students and other end users will be trained using online resources and in classroom approach as needed. Contractor will be training 3-5 University employees to be the trainers for end user training.

See Attached FUNCTIONAL DESCRIPTIONS In Attachment IV .

## 2.2 Task and Services

The implementation services shall support the following institutions of the University of Louisiana System:

- Louisiana Tech University (TECH)
- Southeastern Louisiana University (SLU)
- University of New Orleans (UNO)

See Project Task Requirements in Attachment V- Schedule of Integrations.-.

## 2.3 Deliverables

Schedule requirements

The System will present its target implementation dates.. Contractor will make recommendations for a precise implementation timeline based on its experience with similar implementations of this size and complexity. The proposed timeline should be based on the following targets:

- The System expects to initiate the implementation project in Summer of 2021.
- The System is looking to the Contractor for a recommendation regarding go-live dates by function.
- The Contractor shall recommend production dates by functional area based on their experience and best practices. The Contractor should clearly disclose any assumptions and/or requirements that would impact proposed dates in its proposal.

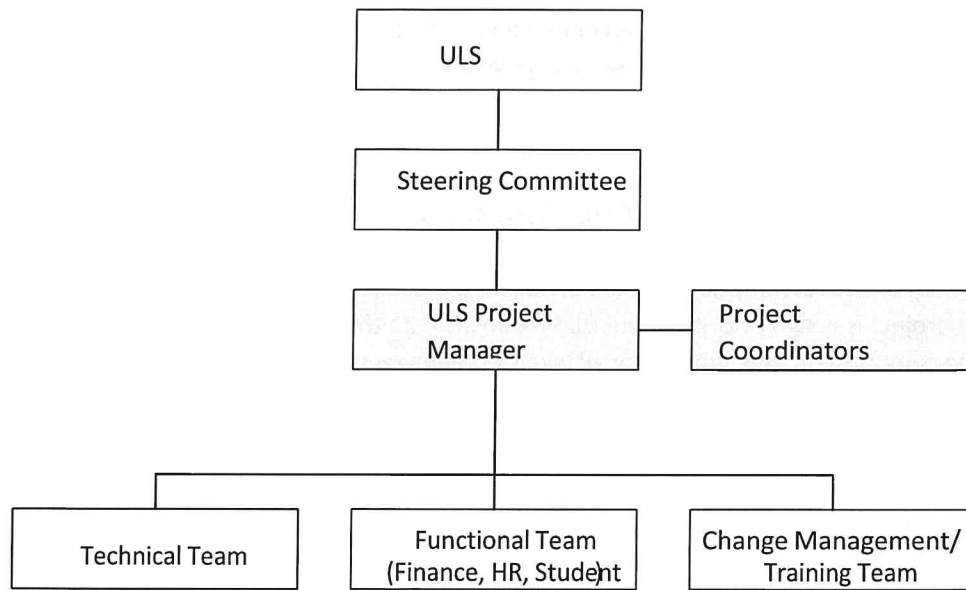
## 2.4 Technical Requirements

This project is for the implementation services of Workday Student at three (3) separate and unique institutions in the University of Louisiana System. Workday Human Resources and Financial has been implemented as of December, 2020. Contractor will work with the UL System and institutions to ensure seamless integration with Workday Financial and Human Capital Management Resources.

## 2.5 Project Requirements

### PROJECT GOVERNANCE AND ANTICIPATED PROJECT ORGANIZATION

The following chart provides a high-level governance and anticipated organizational structure for the Project. Contractor shall include any recommended adjustments to the anticipated structure.



The System will follow standard project management methodologies to secure executive sponsorship, concept and business process approval, and to ensure effective planning of activities and utilization of resources.

The Project Sponsors will be responsible for executive communications on project related matters, providing executive input to the Project Management, and setting the high-level strategy for the project. The Sponsors will negotiate and determine availability of project resources as required.

The Steering Committee will be responsible for executive communications on project-related matters, providing input to Project Management, disseminating project information within their organizations, and advocating for the implementation of approved standardized business processes and data across all institutions. The Steering Committee will approve all significant modifications to designed business processes and other significant changes to the system as delivered.

The ULS project manager will be responsible for making recommendations to the Steering Committee after reviewing all standardization and/or configuration of Workday as provided by the Functional teams. The ULS Project Manager will also review and provide resolution to project issues submitted by the project team and, if needed, will submit project issues to the Steering Committee. The ULS Project Manager ensures compliance with project goals, objectives, project management guidelines, project standards, project scope, quality management, project budget, reporting and documentation. It ensures project staff and Contractor resources are leveraged effectively across the project, and reviews and recommends approval of project deliverables. Finally, the ULS Project Manager is responsible for managing the project work plan, monitoring activities of the ERP project team, timelines, and risks. They also have overall responsibility for reporting on the status of project activities, milestones, and deliverables.

The Technical Team and Functional Team is comprised of subject matter experts that will be responsible for the development, standardization and/or configuration, and testing of business processes. The Change Management team will oversee the organizational change management, communication and training needs of end-users.

#### KEY PROJECT ASSUMPTIONS

The following key project assumptions should be taken into consideration in the delivery of services. The Workday project is a high priority of the UL System and the three participating Universities with corresponding commitment and support by all levels of management to include timely consensus and deadline-based decisions.

- The three participating Universities are committed to changing business processes and requirements, and expect to use Workday delivered Business Processes as the starting point for design/configuration activities. Deviation from the delivered business processes will not be an arbitrary action on the part of the System.
- The System will establish a project management team with appropriate levels of authority and project status reporting.
- There will be System representatives and Contractor leads for each major functional and technical area identified within the project organization.
- The UL System and the three participating Universities will commit sufficiently skilled staff resources to the Project as reflected in an agreed upon work plan and staffing plan.
- The Contractor will provide a tool for web collaboration and meetings for the project. The Contractor will use this tool and any other enabling technology for effective engagement of Subject Matter Experts(SME) across all institutions and for minimization of travel expenses.
- The three (3) participating institutions can reach agreement on critical decisions such as business process configuration and whether gaps in functionality can be addressed through other means than software extensions.
- All existing systems will continue to operate as required throughout the deployment period.
- The Contractor will commit expert resources to meet the Project timeline, post-implementation support, and knowledge transfer.

##### 2.5.1 Staff Roles & Responsibilities

Contractor will staff its team based on the following key project roles who are committed for the entirety of the Contract term. Resumes should clearly show the desired skills and experience for the proposed key personnel to be assigned to this project, including those of subcontractor(s), if any:



<b>Role</b>	<b>Description</b>
Project Director	Provides direction to deployment team and manages critical deliverables, milestones, issues and project risks. The Project Director assists in managing executive stakeholder engagement and participates in Steering Committee meetings.
Engagement Manager	Guides the Workday Student deployment team in using the Workday Student deployment methodology. The Engagement Manager is responsible for the project plan, staffing of resources, execution of tasks, budget adherence, and management of project risks and resolution of issues that arise.
Senior Consultant	Responsible for the architecture and support of consultants for workstreams of Workday Student. The architect will provide guidance and assistance during configuration and design sessions in accordance to scope and requirements.
Functional Consultant(s)	Responsible for functional and technical project activities and providing guidance on the deployment of Workday Student. Functional consultants lead workshops to assist in the understanding and utilization of the features and functions of Workday Student. Consultants will guide University teams to design processes, gather functional, integration and reporting requirements, and map current data to Workday Student. The consultants are responsible for configuration of Workday according to requirements, and for providing support through all project stages (Architect, Configure and Prototype, Test, and Deploy).
Integrations Developer(s)	Build and configure integrations in-scope for the project in accordance to configuration requirements set by Functional Consultants and University teams. The Integrations consultants participate in all stages of the project and are responsible for the support of integration testing activities.
Data Conversion Consultant(s)	Responsible for assisting in the conversion strategy and execution of data loads. Data Conversion consultants will work with Functional Consultants, IT teams at the institutions, and business analysts in the mapping of data according to configuration requirements set by the project team. Data Conversion Consultants assist in the resolution of data related issues and guide the institution teams in the use of best practices in the preparation of the data for loading into Workday.
Delivery Assurance Consultant(s)	Responsible for conducting reviews at the completion of every major milestone of all deliverables in scope.

A full list of staff roles, responsibilities, and experience requirements can be found in [Attachment VIII: Staff Roles, Responsibilities, Skill, and Experience](#).

## PART 3: EVALUATION

Proposals that pass the preliminary screening and mandatory requirements review will be evaluated based on information provided in the proposal. The evaluation will be conducted according to the following.

### Company Background and Experience (24 Points)

Proposal with highest rating may receive up to twenty-four (24) points. Points shall be assigned based on factors within this category, which include but are not limited to:

- Quality of company references
- Stability of company business
- Completion of successful implementations/services at similar higher education organizations
- Compliance with specified requirements and standards
- Compliance with specified contractual terms and conditions

### Project Approach and Methodology (24 Points)

Proposal with the highest rating may receive up twenty-four (24) points. Points shall be assigned based on factors within this category, which include but are not limited to:

- Ability to meet System timeline and requirements
- Completeness of approach proposed
- Fit of methodology to System needs
- Approach that reduces risk to the System and facilitates System-wide deployment and user acceptance
- Demonstrated quality of methodology from similar engagements

### Project Team Qualifications (15 Points)

Proposal with the highest rating may receive up to fifteen (15) points. Points shall be assigned based on factors within this category, which include but are not limited to:

- Quality of project team experience
- Previous experience in similar role
- Previous experience with Workday modules to be implemented

### Louisiana Veteran and/or Hudson Initiative (12 Points)

The Evaluation Team will evaluate and score the proposals using the criteria and scoring as follows:

Criteria	Maximum Score
Company Background and Experience	24
Approach and Methodology	24
Proposed Project Team Qualifications	15
Louisiana Veteran and/or Hudson Initiative <ul style="list-style-type: none"> <li>Up to 10 points available for Hudson-certified Proposers;</li> <li>Up to 12 points available for Veteran-certified Proposers;</li> <li>If no Veteran-certified Proposers, those two points are not awarded.</li> </ul> See Section 3.2 for details.	12
Cost	25*
<b>TOTAL SCORE</b>	<b>100</b>

The proposal will be evaluated in light of the material and the substantiating evidence presented to the State, not on the basis of what may be inferred.

Proposer must receive a minimum score of 31.5 points (50%) of the total available points in the technical categories of Company Background and Experience, Approach and Methodology and Proposed Project Team Qualifications to be considered responsive to the RFP. **Proposals not meeting the minimum score shall be rejected and not proceed to further Cost or Louisiana Veteran and/or Hudson Initiative evaluation.**

The scores for the Financial Proposals, Technical Proposals and Veteran and Hudson Initiative will be combined to determine the overall score. The Proposer with the highest overall score will be recommended for award.

### 3.1 Cost Evaluation

Points shall be assigned for the total cost of the services, as follows:

- Cost points will be assigned on the Total Cost reflected on the Cost Proposal..
- The proposal with the lowest total estimated cost will receive the maximum points possible for this section.
- Other Proposers shall receive cost points based upon the following formula.

$$CCS = (LPC/TCP \times 25)$$

Where: CCS = Computed Cost Score (points) for Proposer being evaluated  
LPC = Lowest total Proposed Cost of all Proposers  
TCP = Total Cost of Proposer being evaluated

### 3.2 Veteran-Owned and Service-Connected Disabled Veteran-Owned Small Entrepreneurships (Veteran Initiative) and Louisiana Initiative for Small Entrepreneurships (Hudson Initiative) Programs Participation

A. Twelve percent (12%) of the total evaluation points in this RFP are reserved for Proposers who are certified small entrepreneurship, or who will engage the participation of one or more certified small entrepreneurship as subcontractors. Reserved points shall be added to the applicable Proposers' evaluation score as follows:

B. Proposer Status and Allotment of Reserved Points

- i. If the Proposer is a certified Veterans Initiative small entrepreneurship, the Proposer shall receive points equal to twelve percent (12%) of the total evaluation points in this RFP.
- ii. If the Proposer is a certified Hudson Initiative small entrepreneurship, the Proposer shall receive points equal to ten percent (10%) of the total evaluation points in this RFP.
- iii. If the Proposer demonstrates its intent to use certified small entrepreneurship(s) in the performance of contract work resulting from this solicitation, the Proposer shall receive points equal to the net percentage of contract work which is projected to be performed by or through certified small entrepreneurship subcontractors, multiplied by the appropriate number of evaluation points.
- iv. The total number of points awarded pursuant to this Section shall not exceed twelve percent (12%) of the total number of evaluation points in this RFP.

If the Proposer is a certified Veterans Initiative or Hudson Initiative small entrepreneurship, the Proposer must note this in its proposal in order to receive the full amount of applicable reserved points.

If the Proposer is not a certified small entrepreneurship, but has engaged one (1) or more Veterans Initiative or Hudson Initiative certified small entrepreneurship(s) to participate as subcontractors, the Proposer shall provide the following information for each certified small entrepreneurship subcontractor in order to obtain any applicable Veterans Initiative or Hudson Initiative points:

- i. Subcontractor's name;
- ii. Subcontractor's Veterans Initiative and/or the Hudson Initiative certification;
- iii. A detailed description of the work to be performed; and
- iv. The anticipated dollar value of the subcontract for the three-year contract term.

**Note** – *it is not mandatory to have a Veterans Initiative or Hudson Initiative certified small entrepreneurship subcontractor. However, it is mandatory to include this information in order to receive any allotted points when applicable.*

If multiple Veterans Initiative or Hudson Initiative subcontractors will be used, the above required information should be listed for each subcontractor. The Proposer should provide a sufficiently detailed description of each subcontractor's work so the Department is able to determine if there is duplication or overlap, or if the subcontractor's services constitute a distinct scope of work from each other subcontractor(s).

## **PART 4: PERFORMANCE STANDARDS**

Performance shall be measured by completion of phases per schedule defined below. Dates of completion may be modified per proposal and contract negotiation.

### **4.1 Performance Measurement/Evaluation/Monitoring Plan**

#### **4.1.1 Performance Measures/Evaluation:**

Section 2.5 Project Requirements describes Project Governance and Project Organization and Project Management. ULS Project Manager will represent the University of Louisiana System and will work with the Steering Committee and representatives from the three Universities. On-going evaluation will be by Project Governance and Project Organization described. Monthly written status reports will be submitted to Contractor and all three System Universities. Prime measure will be successful in adherence with Go Live Dates.

#### **4.1.2 Monitoring Plan:**

Section 2.5 describes Project Governance and Project Organization and Project Management. ULS Project Manager will represent the University of Louisiana System and will work with the Steering Committee and representatives from the three Universities. On-going evaluation will be by Project Governance and Project Organization described. Monthly written status reports will be submitted to Contractor and all three System Universities. Prime measure will be successful in adherence with Project Budget and Go Live Dates.

### **4.2 Veteran and Hudson Initiative Programs Reporting Requirements**

During the term of the contract and at expiration, the Contractor will be required to report Veteran-Owned and Service-Connected Disabled Veteran-Owned and Hudson Initiative small entrepreneurship subcontractor participation and the dollar amount of each.

If a contract is awarded to a Proposer who proposed a good faith subcontracting plan, the using agency, the Louisiana Department of Economic Development (LED), or the Office of State Procurement (OSP) may audit Contractor to determine whether Contractor has complied in good faith with its subcontracting plan. The Contractor must be able to provide supporting documentation (i.e., phone logs, fax transmittals, letter, e-mails) to demonstrate its good faith subcontracting plan was followed. If it is determined at any time by the using agency, LED, or the OSP Director that the Contractor did not in fact perform in good faith its subcontracting plan, the contract award or the existing contract may be terminated.

## ATTACHMENT I: CERTIFICATION STATEMENT

The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of the Request for Proposals (RFP), including attachments.

**OFFICIAL CONTACT.** The State requests that the Proposer designate one person to receive all documents and the method in which the documents are best delivered. The Proposer should identify the Contact name and fill in the information below: (Print Clearly)

- A. Official Contact Name: \_\_\_\_\_
- B. E-mail Address: \_\_\_\_\_
- C. Facsimile Number with area code: (     ) \_\_\_\_\_
- D. US Mail Address: \_\_\_\_\_

Proposer shall certify that the above information is true and shall grant permission to the State or Agencies to contact the above named person or otherwise verify the information provided.

By its submission of this proposal and authorized signature below, Proposer shall certify that:

1. The information contained in its response to this RFP is accurate;
2. Proposer shall comply with each of the mandatory requirements listed in the RFP and will meet or exceed the functional and technical requirements specified therein;
3. Proposer shall accept the procedures, evaluation criteria, mandatory contract terms and conditions, and all other administrative requirements set forth in this RFP.
4. Proposer's quote shall be valid for at least 90 calendar days from the date of proposal's signature below;
5. Proposer understands that if selected as the successful Proposer, he/she will have fourteen (14) business days from the date of delivery of final contract in which to complete contract negotiations, if any, and execute the final contract document.
6. Proposer shall certify, by signing and submitting a proposal for \$25,000 or more, that their company, any subcontractors, or principals are not suspended or debarred by the General Services Administration (GSA) in accordance with the requirements in 2 CFR §200 Subpart F. (A list of parties who have been suspended or debarred can be viewed via the internet at <https://www.sam.gov>.)
7. Proposer understands that, if selected as a contractor, the Louisiana Department of Revenue must determine that it is current in the filing of all applicable tax returns and reports and in payment of all taxes, interest, penalties, and fees owed to the state and collected by the LDR. Proposer shall comply with R.S. 39:1624(A)(10) by providing its seven-digit LDR account number in order for tax payment compliance status to be verified.
8. Proposer further acknowledges its understanding that issuance of a tax clearance certificate by LDR is a necessary precondition to the approval of any contract by the Office of State Procurement. The

contracting agency reserves the right to withdraw its consent to any contract without penalty and proceed with alternate arrangements, should a prospective contractor fail to resolve any identified outstanding tax compliance discrepancies with the LDR within seven (7) days of such notification.

9. Proposer certifies and agrees that the following information is correct: In preparing its response, the Proposer has considered all proposals submitted from qualified, potential subcontractors and suppliers, and has not, in the solicitation, selection, or commercial treatment of any subcontractor or supplier, refused to transact or terminated business activities, or taken other actions intended to limit commercial relations, with a person or entity that is engaging in commercial transactions in Israel or Israeli-controlled territories, with the specific intent to accomplish a boycott or divestment of Israel. Proposer also has not retaliated against any person or other entity for reporting such refusal, termination, or commercially limiting actions. The State reserves the right to reject the response of the Proposer if this certification is subsequently determined to be false, and to terminate any contract awarded based on such a false response.
10. Proposer certifies that the cost submitted was independently arrived at without collusion.

Signature of Proposer or  
Authorized Representative

Typed or Printed Name:

Date:

Title:

Company Name:

Address:

City:

State:

Zip:

## ATTACHMENT II: SAMPLE CONTRACT (IT version)

### STANDARD INFORMATION TECHNOLOGY/DATA PROCESSING CONSULTING CONTRACT

This standard data processing consulting contract format has been approved for use by the Office of State Procurement (OSP), Professional Contracts and the Procurement Support Team (PST). See sample standard information technology/data processing consulting contract below. Revisions should be redlined or highlighted when submitted to the PST for review and approval.

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### STATE OF LOUISIANA

(Revised 7/29/2019)

#### CONTRACT

On this \_\_\_\_ day of \_\_\_\_\_, 20\_\_, the (Agency Name), hereinafter sometimes referred to as the "State", and (Contractor's name and legal address including zip code), hereinafter sometimes referred to as the "Contractor", do hereby enter into a contract under the following terms and conditions.

#### 1.0 SCOPE OF SERVICES

Contractor hereby agrees to furnish services to State as specified in Section 3.0.

#### 1.1 CONCISE DESCRIPTION OF SERVICES

*[Provide the concise description of the data processing consulting services to be acquired]*

#### 1.2 COMPLETE DESCRIPTION OF SERVICES

A full description of the scope of services is contained in the following Attachments which are made a part of this contract:

Attachment I - Statement of Work

Attachment II - Hardware/Software Environment

Attachment III - Contractor Personnel and Other Resources

Attachment IV - State Furnished Resources

#### 2.0 ADMINISTRATIVE REQUIREMENTS



## 2.1 TERM OF CONTRACT

This contract shall begin on \_\_\_\_\_ and shall end on \_\_\_\_\_. State has the right to extend this contract up to a total of three years with the concurrence of the Contractor.

## 2.2 WARRANTIES

Contractor shall indemnify State against any loss or expense arising out of any breach of any specified Warranty.

A. *Period of Coverage.* The Warranty period for software and system components covered under this Contract will begin on the date of acceptance or date of first productive use, whichever occurs later, and will terminate (***spell-out***) (***n***) months thereafter.

B. *Free from Defects.* Contractor warrants that the system developed hereunder shall be free from defect in design and implementation and will continue to meet the specifications agreed to during system design and Contractor will, without additional charge to the State, correct any such defect and make such additions, modifications, or adjustments to the system as may be necessary to operate as specified in the Technical Deliverables accepted by the State.

C. *Software Standards Compliance.* Contractor warrants that all software and other products delivered hereunder will comply with State standards and/or guidelines for resource names, programming languages, and documentation as referenced in Attachment II.

D. *Software Performance.* Specific operating performance characteristics of the software developed and/or installed hereunder are warranted by the Contractor as stated in Attachment I.

E. *Original Development.* Contractor warrants that all materials produced hereunder will be of original development by Contractor, and will be specifically developed for the fulfillment of this contract. In the event the Contractor elects to use or incorporate in the materials to be produced any components of a system already existing, Contractor shall first notify the State, which after whatever investigation the State may elect to make, may direct the Contractor not to use or incorporate any such components. If the State does not object, Contractor may use or incorporate such components at Contractor's expense and shall furnish written consent of the party owning the same to the State in all events. Such components shall be warranted as set forth herein (except for originality) by the Contractor and the Contractor will arrange to transfer title or the perpetual license for the use of such components to the State for purposes of the contract.

F. *No Surreptitious Code Warranty.* Contractor warrants that software provided hereunder will be free from any "Self-Help Code". "Self-Help Code" means any back door, time bomb, or drop dead device or other routine designed to disable a computer program with the passage of time or under the positive control of a person or party other than the State. Excluded from this prohibition are identified and State-authorized features designed for purposes of maintenance or technical support. "Unauthorized Code" means any virus, Trojan horse, worm or other software routine or component designed to permit unauthorized access to disable, erase, or otherwise harm software, equipment, or data, or to perform any other such actions. "Unauthorized Code" does not include "Self-Help Code".

## 2.3 INDEMNIFICATION AND LIMITATION OF LIABILITY

Neither party shall be liable for any delay or failure in performance beyond its control resulting from acts of God or force majeure. The parties shall use reasonable efforts to eliminate or minimize the effect of such events upon performance of their respective duties under Contract.

Contractor shall be fully liable for the actions of its agents, employees, partners or subcontractors and shall fully indemnify and hold harmless the State and its Authorized Users from suits, actions, damages and costs of every name and description relating to personal injury and damage to property caused by Contractor, its agents, employees, partners or subcontractors, without limitation; provided, however, that the Contractor shall not indemnify for that portion of any claim, loss or damage arising hereunder due to the negligent act or failure to act of the State. If applicable, Contractor will indemnify, defend and hold the State and its Authorized Users harmless, without limitation, from and against any and all damages, expenses (including reasonable attorneys' fees), claims, judgments, liabilities and costs which may be finally assessed against the State in any action for infringement of a United States Letter Patent with respect to the Products furnished, or of any copyright, trademark, trade secret or intellectual property right, provided that the State shall give the Contractor: (i) prompt written notice of any action, claim or threat of infringement suit, or other suit, (ii) the opportunity to take over, settle or defend such action, claim or suit at Contractor's sole expense, and (iii) assistance in the defense of any such action at the expense of Contractor. Where a dispute or claim arises relative to a real or anticipated infringement, the State or its Authorized Users may require Contractor, at its sole expense, to submit such information and documentation, including formal patent attorney opinions, as the Commissioner of Administration shall require.

The Contractor shall not be obligated to indemnify that portion of a claim or dispute based upon: i) Authorized User's unauthorized modification or alteration of a Product, Material or Service; ii) Authorized User's use of the Product in combination with other products not furnished by Contractor; iii) Authorized User's use in other than the specified operating conditions and environment.

In addition to the foregoing, if the use of any item(s) or part(s) thereof shall be enjoined for any reason or if Contractor believes that it may be enjoined, Contractor shall have the right, at its own expense and sole discretion as the Authorized User's exclusive remedy to take action in the following order of precedence: (i) to procure for the State the right to continue using such item(s) or part (s) thereof, as applicable; (ii) to modify the component so that it becomes non-infringing equipment of at least equal quality and performance; or (iii) to replace said item(s) or part(s) thereof, as applicable, with non-infringing components of at least equal quality and performance, or (iv) if none of the foregoing is commercially reasonable, then provide monetary compensation to the State up to the dollar amount of the Contract.

For all other claims against the Contractor where liability is not otherwise set forth in the Contract as being "without limitation", and regardless of the basis on which the claim is made, Contractor's liability for direct damages, shall be the greater of \$100,000, the dollar amount of the Contract, or two (2) times the charges rendered by the Contractor under the Contract. Unless otherwise specifically enumerated herein or in the work order mutually agreed between the parties, neither party shall be liable to the other for special, indirect or consequential damages, including lost data or records (unless the Contractor is required to back-up the data or records as part of the work plan), even if the party has been advised of the possibility of such damages. Neither party shall be liable for lost profits, lost revenue or lost institutional operating savings.

The State and Authorized User may, in addition to other remedies available to them at law or equity and upon notice to the Contractor, retain such monies from amounts due Contractor, or may proceed against the performance and payment bond, if any, as may be necessary to satisfy any claim for damages, penalties, costs and the like asserted by or against them.

## **2.4 STAFF INSURANCE**

Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, his agents, representatives, employees or subcontractors. The cost of such insurance shall be included in the total contract amount included in Section 5.0. For insurance requirements, refer to Attachment V.

## **2.5 LICENSES AND PERMITS**

Contractor shall secure and maintain all licenses and permits, and pay inspection fees required to do the work required to complete this contract.

## **2.6 SECURITY**

Contractor's personnel will always comply with all security regulations in effect at the State's premises, and externally for materials belonging to the State or to the project. Contractor is responsible for reporting any breach of security to the State promptly.

## **2.7 TAXES**

Contractor is responsible for payment of all applicable taxes from the funds to be received under this contract. Contractor's federal tax identification number is \_\_\_\_\_. Contractor's seven-digit LDR account number is \_\_\_\_\_.

In accordance with R.S. 39:1624(A)(10), the Louisiana Department of Revenue must determine that the prospective contractor is current in the filing of all applicable tax returns and reports and in payment of all taxes, interest, penalties, and fees owed to the state and collected by the Department of Revenue prior to the approval of this contract by the Office of State Procurement. The prospective contractor hereby attests to its current and/or prospective compliance, and agrees to provide its seven-digit LDR Account Number to the contracting agency so that the prospective contractor's tax payment compliance status may be verified. The prospective contractor further acknowledges understanding that issuance of a tax clearance certificate by the Louisiana Department of Revenue is a necessary precondition to the approval and effectiveness of this contract by the Office of State Procurement. The contracting agency reserves the right to withdraw its consent to this contract without penalty and proceed with alternate arrangements should the vendor fail to resolve any identified apparent outstanding tax compliance discrepancies with the Louisiana Department of Revenue within seven (7) days of such notification.

## **2.8 CONFIDENTIALITY**

All financial, statistical, personal, technical and other data and information relating to the State's operations which are designated confidential by the State and made available to the Contractor in order to carry out this Contract, or which becomes available to the Contractor in carrying out this contract, shall be protected by the Contractor from unauthorized use and disclosure through the observance of the same or more effective procedural requirements as are applicable to the State. Contractor shall not be required to keep confidential any data or information which is or becomes publicly available, is already rightfully in the Contractor's possession, is independently developed by the Contractor outside the scope of this Contract, or is rightfully obtained from third parties.

## **3.0 TECHNICAL REQUIREMENTS**

### **3.1 STATEMENT OF WORK**

Contractor will perform services according to the terms of this Contract and according to the Statement of Work (SOW) in Attachment I.

### **3.2 CONFIGURATION REQUIREMENTS**

The software system being installed shall be designed and configured by the Contractor to operate within the State's hardware, software, and networking environments as specified in Attachment II.

### 3.3 PROJECT MANAGEMENT

Contractor shall provide, at a minimum, the following project management functions:

*A. Provide Project Management* - Contractor will provide day-to-day project management using best management practices for all tasks and activities necessary to complete the Statement of Work.

*B Provide Project Work Plan* - Contractor shall develop and maintain a Project Work Plan which breaks down the work to be performed into manageable phases, activities and tasks as appropriate. The work plan will identify: activities/tasks to be performed, project personnel requirements (both State and Contractor), estimated workdays/personnel hours to complete, expected start and completion dates. Scheduled completion dates for each deliverable shall specifically be included. Written concurrence of both parties will be required to amend the Work Plan. The Project Work Plan shall be approved by the State before project payments are made.

*C. Provide Project Progress Reports* - Contractor shall submit monthly progress reports signed by the Contractor's Project Manager to the State, no later than 10 days after the close of each calendar month. Each progress report shall describe the status of the Contractor's performance since the preceding report, including the products delivered, descriptions of problems encountered with a plan for resolving them, the work to be accomplished in the coming reporting period, and identifying issues requiring management attention, particularly those which may affect the scope of services, the project budget, or the deliverables to be provided by the Contractor. Each report shall identify activities by reference to the Project Work plan.

*D. Provide Time Sheets* - Accompanying each Progress Report, the Contractor shall submit time sheets to the State Project Director indicating effort expended and work performed by each member of its, or its subcontractors' staff, participating in this contract. Time sheets shall, at a minimum, identify the name of the individual performing the work and the number of hours worked during the period by Work Plan task.

*E. Provide Issue Control.* Contractor will develop and implement with State approval, procedures and forms to monitor the identification and resolution of key project issues and problems.

### 3.4 QUALITY ASSURANCE REVIEWS

State reserves the right to conduct Quality Assurance Reviews at appropriate checkpoints throughout the project. Contractor will facilitate the review process by making staff and information available as requested by the reviewers at no additional cost to the State.

### 3.5 CONTRACTOR RESOURCES

Contractor agrees to provide the following Contract related resources:

*A. Project Manager.* Contractor shall provide a project manager to provide day-to-day management of project tasks and activities, coordination of Contractor support and administrative activities, and for supervision of Contractor employees. The project manager shall possess the technical and functional skills and knowledge to direct all aspects of the project.

*B. Key Personnel.* Contractor shall assign staff who possess the knowledge, skills, and abilities to successfully perform assigned tasks. Individuals to be assigned by the Contractor are listed in Attachment III.

*C. Personnel Changes.* Contractor's Project Manager and other key personnel assigned to this Contract shall not be replaced without the written consent of the State. Such consent shall not be unreasonably withheld or delayed provided an equally qualified replacement is offered. In the event that any State or Contractor personnel become unavailable due to resignation, illness or other factors, excluding assignment to project outside this contract, outside

of the State's or Contractor's reasonable control, as the case may be, the State or the Contractor, as the case may be, shall be responsible for providing an equally qualified replacement in time to avoid delays to the work plan.

D. *Other Resources.* Contractor will provide other resources as specified in Attachment III.

### **3.6 STATE PROJECT DIRECTOR**

State shall appoint a Project Director for this Contract who will provide oversight of the activities conducted hereunder. The Project Director is identified in Attachment IV. Notwithstanding the Contractor's responsibility for total management during the performance of this Contract, the assigned State Project Director shall be the principal point of contact on behalf of the State and will be the principal point of contact for Contractor concerning Contractor's performance under this Contract.

### **3.7 STATE FURNISHED RESOURCES**

State will make available to the Contractor for use in fulfillment of this contract those resources described in Attachment IV.

### **3.8 STATE STANDARDS AND GUIDELINES**

Contractor shall comply with State standards and guidelines related to systems development, installation, software distribution, security, networking, and usage of State resources described in Attachment II.

### **3.9 ELECTRONICALLY FORMATTED INFORMATION**

Where applicable, State shall be provided all documents in electronic format, as well as hard-copy. Electronic media prepared by the Contractor for use by the State will be compatible with the State's comparable desktop application (e.g., spreadsheets, word processing documents). Conversion of files, if necessary, will be Contractor's responsibility. Conversely, as required, Contractor must accept and be able to process electronic documents and files created by the State's current desktop applications as described in Attachment II.

### **4.0 ACCEPTANCE OF DELIVERABLES**

Contract deliverables will be submitted, reviewed, and accepted according to the following procedure:

A. *General.* Except where this Contract provides different criteria, work will be accepted if it has been performed in accordance with the applicable specifications for Contractor's work in the Statement of Work, the Request for Proposals, the Contractor's Proposal, and/or as subsequently modified in State- approved design documents developed within this Project, and in the accepted final documentation.

B. *Submittal and Initial Review.* Upon written notification by Contractor that a Deliverable is completed and available for review and acceptance, the State Project Director will use best efforts to review the Deliverable within five (5) business days after the Deliverable is presented to the State Project Director, but in no event later than ten (10) business days after the Deliverable is presented to the State Project Director. Within the applicable period, the State Project Director will direct the appropriate review process, coordinate any review outside the Project team, and present results to any user committees and/or Steering Committee for approval, as needed. The initial review process will be comprehensive with a view toward identifying all items which must be modified or added to enable

a Deliverable to be approved. A failure to deliver all or any essential part of a Deliverable shall be cause for non-acceptance.

*C. Notification of Acceptance or Rejection.* If no notification is delivered to Contractor within the applicable period, the Deliverable will be considered approved. If State disapproves a Deliverable, State will notify Contractor in writing of such disapproval, and will specify those items which, if modified or added, will cause the Deliverable to be approved.

*D. Resubmitting Corrected Deliverables.* With respect to such Deliverables, Contractor will resubmit the Deliverable with requested modifications and the State Project Director will review such modifications within five (5) business days. If no notification is delivered to Contractor within those five (5) business days, the Deliverable is considered approved. If the State disapproves that Deliverable, the State will notify Contractor in writing of any additional deficiencies which result from such modifications and Contractor will resubmit the Deliverable with the requested modifications. The parties agree to repeat this process as required until all such identified deficiencies are corrected or a determination of breach or default is made. The payment by the State for each activity is contingent upon correction of all such deficiencies and acceptance by the State.

*F. Payment of Retainage Based on Acceptance.* Final payment of any retainage will be contingent on completion and acceptance of all contract deliverables.

## **5.0 COMPENSATION AND MAXIMUM AMOUNT OF CONTRACT**

In consideration of the services required by this contract, State hereby agrees to pay to Contractor a maximum fee of \$\_\_\_\_. Contractor will comply with the Division of Administration State General Travel Regulations, as set forth in Division of Administration Policy and Procedure Memorandum No. 49. Payment will be made only on approval of \_\_\_\_\_ (Name of Designee).

*(There are many payment terms that can be negotiated with the Contractor. Below are examples of some that are used. Any one or combination of these is acceptable as long as payment is tied to the Acceptance of the Deliverables. The terms used are illustrative only)*

### **Example A. Payment by Task.**

The Contract resulting from this Request for Proposal shall be compensated on a firm fixed price basis with progress payments upon completion of all deliverables within a series of tasks. Certain tasks have been identified as payment tasks (see below).

Payments, less retainage, will be made upon successful completion and after review and written approval by the State of the tasks and deliverables. All completed work and deliverables shall be in conformity with the Request for Proposal specifications and commonly accepted industry standards.

### **Payment Schedule**

State has identified certain tasks as payment tasks. Payment tasks are those which represent the completion of major milestones of the project. Payment tasks are as follows:

\$000.00 Task 4 Verify Functional Requirements

\$000.00 Task 5 Develop Detailed Design for Modified WIS System

\$000.00 Task 7 WIS System Modifications and Testing

\$000.00 Task 9 Develop System Documentation



\$000.00 Task 12 Conduct Pilot Test

\$000.00 Task 14 Statewide Implementation

Payments are predicated upon successful completion and written approval by the State of the described tasks and deliverables as provided in the Acceptance of Deliverables Section 4.0. Payments will be made to the Contractor after written acceptance by the State of the payment task and receipt of an invoice. State will make every reasonable effort to make payments within 25 work days of the receipt of invoice.

The amount of the payment will be determined in the following manner.

- Tasks specified as non-payment tasks will accumulate forward to the next payment task. For example, the first payment task is Task 4. Upon completion of Task 4, the Contractor will be paid for all allowable charges incurred up through Task 4, less retainage.
- The allowable payment amount will be multiplied by 90 percent, giving the amount which will be remitted to the Contractor. Ten percent of the allowable milestone payment will be retained until written acceptance by the State of all deliverables provided by the contract.
- Upon written State acceptance of the system's successful implementation, one-half of the retained funds will be paid to the Contractor.
- The remaining retained funds will be paid to the Contractor upon State acceptance of the system following the warranty/maintenance period.
- No interest on retained funds shall accrue to the Contractor.

Prohibition Against Advance Payments. No compensation or payment of any nature will be made in advance of services actually performed and/or supplies furnished.

**Example B. *Payment by Percentage of Completion***

Payment for the development of the Project will be based on completion of project milestones by Contractor and accepted as per Section 4.0. Each Project milestone has been assigned a percentage. This percentage will be used to determine the portion of Contractor's fee for developing the Project that shall be paid upon successful completion and acceptance of deliverables resulting from the Project milestone as provided in Section 4.0. The project milestones and payment percentages are listed below:

Project Milestone Percentage

Project Schedule showing start and end dates for key project milestones accepted by the State and conclusion of initial project meeting where objectives and time tables are agreed to by the State and the Contractor 10%

Applications and Analysis Completed 40%

Testing procedures accepted by the State and training of State personnel 30%

Final Plan accepted by the State 20%

## **6.0 TERMINATION**

### **6.1 TERMINATION FOR CAUSE**

State may terminate this Contract for cause based upon the failure of Contractor to comply with the terms and/or conditions of the Contract; provided that the State shall give the Contractor written notice specifying the Contractor's failure. If within thirty (30) days after receipt of such notice, the Contractor shall not have either corrected such failure or, in the case of failure which cannot be corrected in thirty (30) days, begun in good faith to correct said failure and thereafter proceeded diligently to complete such correction, then the State may, at its option, place the Contractor in default and the Contract shall terminate on the date specified in such notice. Contractor may exercise any rights available to it under Louisiana law to terminate for cause upon the failure of the State to comply with the terms and conditions of this contract; provided that the Contractor shall give the State written notice specifying the State's failure and a reasonable opportunity for the state to cure the defect.

### **6.2 TERMINATION FOR CONVENIENCE**

State may terminate the Contract at any time without penalty by giving thirty (30) days written notice to the Contractor of such termination or negotiating with the Contractor an effective date thereof. Contractor shall be entitled to payment for deliverables in progress, to the extent work has been performed satisfactorily.

## **7.0 REMEDIES FOR DEFAULT**

Any claim or controversy arising out of the contract shall be resolved by the provisions of LSA - R.S. 39:1672.2-1672.4

## **8.0 AVAILABILITY OF FUNDS**

The continuation of this contract is contingent upon the appropriation of funds by the legislature to fulfill the requirements of the contract. If the legislature fails to appropriate sufficient monies to provide for the continuation of the contract, or if such appropriation is reduced by the veto of the Governor or by any means provided in the appropriations act to prevent the total appropriation for the year from exceeding revenues for that year, or for any other lawful purpose, and the effect of such reduction is to provide insufficient monies for the continuation of the contract, the contract shall terminate on the date of the beginning of the first fiscal year for which funds have not been appropriated. Such termination shall be without penalty or expense to the State except for payments which have been earned prior to the termination.

## **9.0 OWNERSHIP OF PRODUCT**

Upon completion of this contract, or if terminated earlier, all software, data files, documentation, records, worksheets, or any other materials related to this contract shall become the property of State. All such software, records, worksheets, or materials shall be delivered to the State within thirty days of the completion or termination of this contract.

## **10.0 NONASSIGNABILITY**

No contractor shall assign any interest in this contract by assignment, transfer, or novation, without prior written consent of the State. This provision shall not be construed to prohibit the contractor from assigning his bank, trust company, or other financial institution any money due or to become due from approved contracts without such prior written consent. Notice of any such assignment or transfer shall be furnished promptly to the State.



## **11.0 RIGHT TO AUDIT**

Contractor grants to the Office of the Legislative Auditor, Inspector General's Office, the Federal Government, and any other duly authorized agencies of the State where appropriate the right to inspect and review all books and records pertaining to services rendered under this contract. Contractor shall comply with federal and/or state laws authorizing an audit of Contractor's operation as a whole, or of specific program activities.

## **12.0 RECORD RETENTION**

Contractor agrees to retain all books, records, and other documents relevant to this contract and the funds expended hereunder for at least three years after final payment, or as required by applicable Federal law, if Federal funds are used to fund this contract.

## **13.0 AMENDMENTS IN WRITING**

Any alteration, variation, modification, or waiver of provisions of this contract shall be valid only when they have been reduced to writing, duly signed. No amendment shall be valid until it has been executed by all parties and approved by the Director of the Office of State Procurement, Division of Administration.

## **14.0 FUND USE**

Contractor agrees not to use funds received for services rendered under this Contract to urge any elector to vote for or against any candidate or proposition on an election ballot nor shall such funds be used to lobby for or against any proposition or matter having the effect of law being considered by the Louisiana Legislature or any local governing authority. This provision shall not prevent the normal dissemination of factual information relative to a proposition on any election ballot or a proposition or matter having the effect of law being considered by the Louisiana Legislature or any local governing authority

## **15.0 NON-DISCRIMINATION**

Contractor agrees to abide by the requirements of the following as applicable: Title VI of the Civil Rights Act of 1964 and Title VII of the Civil Rights Act of 1964, as amended by the Equal Employment Opportunity Act of 1972, Federal Executive Order 11246 as amended, the Rehabilitation Act of 1973, as amended, the Vietnam Era Veteran's Readjustment Assistance Act of 1974, Title IX of the Education Amendments of 1972, the Age Discrimination Act of 1975, the Fair Housing Act of 1968 as amended, and Contractor agrees to abide by the requirements of the Americans with Disabilities Act of 1990.

Contractor agrees not to discriminate in its employment practices, and will render services under this contract without regard to race, color, religion, sex, sexual orientation, national origin, veteran status, political affiliation, disability, or age in any matter relating to employment. Any act of discrimination committed by Contractor, or failure to comply with these statutory obligations when applicable shall be grounds for termination of this contract.

## **16.0 HEADINGS**

Descriptive headings in this contract are for convenience only and shall not affect the construction or meaning of contractual language.

## **17.0 PROHIBITION OF DISCRIMINATORY BOYCOTTS OF ISRAEL**

In accordance with La. R.S. 39:1602.1, for any contract for \$100,000 or more and for any contractor with five or more employees, the Contractor certifies that neither it nor its subcontractors are engaged in a boycott of Israel, and that the Contractor and any subcontractors shall, for the duration of this contract, refrain from a boycott of Israel.

The State reserves the right to terminate this contract if the Contractor, or any Subcontractor, engages in a boycott of Israel during the term of the contract.

## **18.0 ENTIRE AGREEMENT AND ORDER OF PRECEDENCE**

This contract, (together with the Request for Proposals and addenda issued thereto by the State, the proposal submitted by the Contractor in response to the State's Request for Proposals, and any exhibits specifically incorporated herein by reference) constitutes the entire agreement between the parties with respect to the subject matter.

This contract shall, to the extent possible, be construed to give effect to all provisions contained therein: however, where provisions are in conflict, first priority shall be given to the provisions of the contract, excluding the Request for Proposals and the Proposal; second priority shall be given to the provisions of the Request for Proposals and amendments thereto; and third priority shall be given to the provisions of the Proposal.

THUS DONE AND SIGNED on the date(s) noted below

\_\_\_\_\_  
CONTRACTOR'S SIGNATURE

\_\_\_\_\_  
DATE

\_\_\_\_\_  
STATE'S SIGNATURE

\_\_\_\_\_  
DATE

## **OPTIONAL FEDERAL REQUIREMENTS**

### **ANTI-KICKBACK CLAUSE**

Contractor agrees to adhere to the mandate dictated by the Copeland "Anti-Kickback" Act which provides that each Contractor or subgrantee shall be prohibited from inducing, by any means, any person employed in the completion of work, to give up any part of the compensation to which he is otherwise entitled.

### **CLEAN AIR ACT**

Contractor agrees to adhere to the provisions which require compliance with all applicable standards, orders or requirements issued under Section 306 of the Clean Air Act which prohibits the use under nonexempt Federal contracts, grants or loans of facilities included on the EPA list of Violating Facilities.

### **ENERGY POLICY AND CONSERVATION ACT**

Contractor recognizes the mandatory standards and policies relating to energy efficiency which are contained in the State energy conservation plan issued in compliance with the Energy Policy and Conservation Act (P.L. 94-163).

### **CLEAN WATER ACT**

Contractor agrees to adhere to all applicable standards, orders, or requirements issued under Section 508 of the Clean Water Act which prohibits the use under nonexempt Federal contracts, grants, or loans of facilities included on the EPA List of Violating Facilities.

## ATTACHMENT I

### STATEMENT OF WORK

#### 1.0 INTRODUCTION

*[State here a brief description of project and a general description of its scope and objectives. Other topics which may be appropriate to include are: background, relationship of project to department plans and programs, purpose of system being implemented, problems system is intended to address, etc.]*

#### 2.0 DESCRIPTION OF SERVICES/TASKS

*[Describe here tasks or services to be performed by Contractor in terms of scope and expected outcomes or results. This may involve description of major project phases or subsystems.]*

#### 3.0 SCHEDULE REQUIREMENTS

*[Describe here major schedule milestones, such as: project start, when work plan will be finalized and approved, project phases, dates for contract deliverables, implementation target date, etc.]*

#### 4.0 PERFORMANCE MEASURES AND MONITORING PLAN

#### 5.0 DELIVERABLES

Contractor agrees to provide the following deliverables within the time frames specified herein:

*[List the project deliverables with a description of each deliverable. More information can be placed in a separate attachment or included by reference to the specific Request for Proposals and/or the proposal provisions.]*

Examples are as follows:

Examples of Deliverables	
Deliverable	Description
Technical Assessment	Provide <i>Technical Assessment</i> . Contractor will review those areas of the State's data processing environment; such as: standards and guidelines, development tools, technical resources, hardware capacities, software supported, networks, facilities, specified arrangements, etc related to the Statement of Work to be provided; and, if warranted, prepare a memorandum identifying areas where, in Contractor's opinion, the State's technical environment may materially impair Contractor from successfully completing the Contract. The Project Environment memorandum, if prepared, shall be submitted prior to delivery of the Project Work Plan.
Information Planning	Provide <i>Information Planning</i> . Contractor will perform necessary analysis tasks and develop an Information Systems Plan incorporating the functional and technical requirements as specified in the Statement of Work. The systems planning project will encompass such tasks as: defining business strategies, information needs, organization strategies, application strategies, information technology strategies, implementation strategies; and defining and planning specific projects to be implemented. An outline specifying the nature of the content, format, and level of

	detail for the Information Systems Plan will be developed/finalized by the Contractor and approved by the State Project Director.
Functional Systems Requirements	Provide <i>Functional System Requirements</i> . Contractor will perform necessary information gathering and analysis tasks and develop a Functional Systems Requirements report that incorporates the functional and technical requirements of the State according to the Statement of Work. An outline specifying the nature of the content, format, and level of detail for this document will be developed/finalized by the Contractor and approved by the State Project Director. (Note: depending on the nature of the project, this deliverable may be called Preliminary Systems Design, Conceptual Design, Logical Data and Process Model Design, or something appropriately descriptive. The narrative should communicate the context of the work to be performed and the deliverable to be provided.)
Technical Design/ Technical Architecture Report	Provide <i>Technical Design/Technical Architecture Report</i> . Contractor will perform necessary technical design tasks and develop a Technical Design Report that satisfies the provisions of the Statement of Work, the Configuration Requirements, and the Functional Systems Requirements. An outline specifying the nature of the content, format, and level of detail for this report will be developed/finalized by the Contractor and approved by the State Project Director. (Note: depending on the nature of the project, this deliverable may be called Preliminary Systems Design, Conceptual Design, Logical Data and Process Model Design, or something appropriately descriptive. The narrative should communicate the context of the work to be performed and the deliverable to be provided.)
Demonstration Model or Prototype	Provide <i>Demonstration Model</i> . Contractor will develop a demonstration model or prototype of the system as a "proof of concept" for key components in the functional and technical design.
Implementation Planning Report	Provide <i>Implementation Planning Report</i> . Contractor will perform necessary information gathering and analysis tasks to develop an Implementation Planning Report describing the strategy for implementing the system; including: systems testing, acceptance testing, integration, software installation, interfaces, conversion, software distribution, training, "going live", and support. The plan should address resources, time frames, responsibilities, and contingencies. An outline specifying the nature of the content, format, and level of detail for this report will be developed/finalized by the Contractor and approved by the State Project Director.
Programming/Custom Modifications	Provide <i>Programming/Custom Modifications</i> . Contractor will perform programming/coding tasks necessary to produce the software specified in the functional requirements and technical design reports. Tasks performed may include use of scripts, macros, or procedural or command languages which may be required by the development tools being used
Software Installation	Provide <i>Software Installation</i> . Contractor will perform software installation tasks as applicable; such as: database setup, file sizing, software retrofitting, installation of software releases, application table setup, operation setup, file migrations, installation test, system integration, integration test, and performance tuning.
Systems Test and Acceptance Test Support	Provide <i>Systems Test and Acceptance Test Support</i> . This includes tasks such as functional support on system functionality, script development and data setup, technical support on executing special jobs or cycles to facilitate testing, assisting in the actual execution of test scripts and review of results, and development of an acceptance test calendar with all of the appropriate cycles.

Interface Testing	Provide <i>Interface Testing</i> . This includes such tasks as: development and testing of extract programs, input interfaces, output interfaces, and front-end programs that are identified in the Implementation Planning document.
Implementation Support	Provide <i>Implementation Support</i> . Contractor will provide functional support as specified in the Implementation Plan, including such tasks as developing a cut-over schedule, augmenting help-desk operations, etc. Provide <i>Training Delivery</i> . Contractor will provide xxx (nn) training days of instructor training for delivering the ILT course to State personnel as described in the Implementation Plan.
Training Materials	Provide <i>Training Materials</i> . This includes: all Instructor Lead Training (ILT) materials; Computer Based Training (CBT) materials; and application student guides as described in the Implementation Plan.
Documentation	Provide <i>Documentation</i> . This includes: Online Features Manuals; User Guides; Errors and Diagnostics Manual; Operations Guide; Reports Manual; and Application Quick Reference Cards as specified in the Implementation Plan.
WWW Presence	Provide <i>WWW Presence</i> . This includes providing Intranet/Internet access via standard WWW browsers to documentation, training materials; as well as dynamically supporting generation of reports, data queries, submittal of input forms, and other system functions as specified.
Post Implementation Support	Provide <i>Post Implementation Support</i> to the State after the implementation of the system. Contractor will provide xxx (n) qualified staff for XXX month following implementation
Change Control	Provide <i>Change Control</i> . Contractor will develop and implement with State approval, procedures and forms to provide a method for defining, reviewing, prioritizing, scheduling, and approving changes to specifications, designs, programs, procedures, and documentation that may be required within the scope of this project.
Final Project Report	Provide <i>Final Project Report</i> . At the conclusion of the project, the extent and manner to which the project objectives have been met, as well as follow-on recommendations, will be described in a final report. As scheduled in the Work Plan, an outline of this report will be developed by the Contractor and approved by the State Project Director.

## 5.0 STANDARD OF PERFORMANCE

As stipulated in the warranty provisions of this Contract, the following standards of performance for the products delivered hereunder will be warranted as described below:

[Describe here any unique operating characteristics of the software or system that must be warranted to a specified level of performance.]

## **ATTACHMENT II**

### **HARDWARE/SOFTWARE ENVIRONMENT**

The system to be installed must be able to operate on the State data processing facility and configuration as follows:

#### **1.0 HARDWARE AND OPERATING SYSTEM SOFTWARE**

*[List and/or describe here the hardware devices, operating system software, and network infrastructures on which the proposed system must operate, such as: CPU, Operating System/System Utility Software, Disk, Workstations, Teleprocessing Monitor, Networking Protocols, etc.]*

#### **2.0 SPECIAL REQUIREMENTS**

*[List here additional software or equipment necessary to support or augment the software to be installed, such as: Database Management System, Data Dictionary, 4 GL, Query Language, GUI Tools, etc.]*

#### **3.0 STANDARDS AND GUIDELINES**

*[List here references to applicable standards and/or guidelines or indicate "NONE".]*

*[Also, describe any exceptions to State standards and guidelines that will be permitted under this project. However, the State should takes steps to assure control over matters affecting its technical direction. Accordingly, specific emphasis should be given to assure that technologies promoting common infrastructure services (TCP/IP, SNMP), interoperability (both statewide and intra-department), and an open (non-proprietary) systems environment are used.]*

## ATTACHMENT III

### CONTRACTOR PERSONNEL AND OTHER RESOURCES

#### 1.0 CONTRACTOR PERSONNEL

The following individuals are assigned to the project, on a full time basis (unless otherwise indicated), and in the capacities set forth below:

<u>Name/Company Responsibilities/Classification Rate</u>	<u>Expected Duration</u>
--	--------------------------

...	
...	
...	
...	

*[List here all personnel, including subcontractors, who will be assigned to the project. Personnel who will be assigned at a future date may be listed by job classification. Contract may also specify qualifications for each unnamed person.]*

#### 2.0 PC WORKSTATIONS

Contractor will provide its own workstations, any workstation resident software and maintenance thereof.

#### 3.0 NETWORK CONNECTIVITY

Any Contractor-provided workstations or devices to be connected to the State's network, must comply with State network and security standards. Contractor must provide the hardware components, operating system, and software licenses necessary to function as part of the State network. All hardware and software must be reviewed before it is used on the Local Area Network, and may be made operable on the Local Area Network with written approval of the State.



## **ATTACHMENT IV**

### **STATE FURNISHED RESOURCES**

Any resources of the State furnished to the Contractor shall be used only for the performance of this Contract. State will make available to the Contractor, for Contractor's use in fulfillment of this contract, resources as described below:

#### **1.0 PROJECT DIRECTOR**

The Project Director appointed by the State as described in Section 3.6 is \_\_\_\_\_ who is the principal point of contact for this contract on behalf of the State.

#### **2.0 TECHNICAL STAFF**

State will provide xxx (#) technical employees to be manpower loaded at no more than ##% of normal work hours. The level of effort required and time frames will be documented in a memorandum based upon the work plan. Reasonable access to other technical specialists on a limited basis will be coordinated through the State Project Director.

#### **3.0 FUNCTIONAL STAFF**

State will provide xxx (#) functional employees to be manpower loaded at no more than ##% of normal work hours. The level of effort required and time frames will be documented in a memorandum based upon the work plan. Reasonable access to other functional personnel on a limited basis will be coordinated through the State Project Director.

#### **4.0 OFFICE FACILITIES**

State will provide reasonable and normal office space, clerical support, local telephone service, and limited usage of copiers.

#### **5.0 COMPUTER FACILITIES**

State will make available use of computer facilities at reasonable times and in reasonable time increments to support system development, test, and installation activities. Special facility requirements, such as stress testing or conversion, shall be addressed in the appropriate planning documents or documented by the Contractor in a memorandum.

## ATTACHMENT V

### **INSURANCE REQUIREMENTS FOR CONTRACTORS**

The Contractor shall purchase and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or in connection with the performance of the work hereunder by the Contractor, its agents, representatives, employees or subcontractors.

#### **A. MINIMUM SCOPE AND LIMITS OF INSURANCE**

1. **Workers Compensation**

Workers Compensation insurance shall be in compliance with the Workers Compensation law of the State of the Contractor's headquarters. Employers Liability is included with a minimum limit of \$1,000,000 per accident/per disease/per employee. If work is to be performed over water and involves maritime exposure, applicable LHWCA, Jones Act, or other maritime law coverage shall be included. A.M. Best's insurance company rating requirement may be waived for workers compensation coverage only.

2. **Commercial General Liability**

Commercial General Liability insurance, including Personal and Advertising Injury Liability and Products and Completed Operations, shall have a minimum limit per occurrence of \$1,000,000 and a minimum general annual aggregate of \$2,000,000. The Insurance Services Office (ISO) Commercial General Liability occurrence coverage form CG 00 01 (current form approved for use in Louisiana), or equivalent, is to be used in the policy. Claims-made form is unacceptable.

3. **Automobile Liability**

Automobile Liability Insurance shall have a minimum combined single limit per accident of \$1,000,000. ISO form number CA 00 01 (current form approved for use in Louisiana), or equivalent, is to be used in the policy. This insurance shall include third-party bodily injury and property damage liability for owned, hired and non-owned automobiles.

#### **B. DEDUCTIBLES AND SELF-INSURED RETENTIONS**

Any deductibles or self-insured retentions must be declared to and accepted by the Agency. The Contractor shall be responsible for all deductibles and self-insured retentions.

#### **C. OTHER INSURANCE PROVISIONS**

The policies are to contain, or be endorsed to contain, the following provisions:

1. Commercial General Liability and Automobile Liability Coverages

- a. The Agency, its officers, agents, employees and volunteers shall be named as an additional insured as regards negligence by the contractor. ISO Forms CG 20 10 (for ongoing work) AND CG 20 37 (for completed work) (current forms approved for use in Louisiana), or equivalents, are to be used when applicable. The coverage shall contain no special limitations on the scope of protection afforded to the Agency.
- b. The Contractor's insurance shall be primary as respects the Agency, its officers, agents, employees and volunteers for any and all losses that occur under the contract. Any insurance or self-insurance maintained by the Agency shall be excess and non-contributory of the Contractor's insurance.

## 2. Workers Compensation and Employers Liability Coverage

To the fullest extent allowed by law, the insurer shall agree to waive all rights of subrogation against the Agency, its officers, agents, employees and volunteers for losses arising from work performed by the Contractor for the Agency.

## 3. All Coverages

- a. All policies must be endorsed to require 30 days written notice of cancellation to the Agency. Ten-day written notice of cancellation is acceptable for non-payment of premium. Notifications shall comply with the standard cancellation provisions in the Contractor's policy. In addition, Contractor is required to notify Agency of policy cancellations or reductions in limits.
- b. The acceptance of the completed work, payment, failure of the Agency to require proof of compliance, or Agency's acceptance of a non-compliant certificate of insurance shall not release the Contractor from the obligations of the insurance requirements or indemnification agreement.
- c. The insurance companies issuing the policies shall have no recourse against the Agency for payment of premiums or for assessments under any form of the policies.
- d. Any failure of the Contractor to comply with reporting provisions of the policy shall not affect coverage provided to the Agency, its officers, agents, employees and volunteers.

## **D. ACCEPTABILITY OF INSURERS**

1. All required insurance shall be provided by a company or companies lawfully authorized to do business in the jurisdiction in which the Project is located. Insurance shall be placed with insurers with an A.M. Best's rating of **A-:VI or higher**. This rating requirement may be waived for workers compensation coverage only.
2. If at any time an insurer issuing any such policy does not meet the minimum A.M. Best rating, the Contractor shall obtain a policy with an insurer that meets the A.M. Best rating and shall submit another Certificate of Insurance within 30 days.

## **E. VERIFICATION OF COVERAGE**

1. Contractor shall furnish the Agency with Certificates of Insurance reflecting proof of required coverage. The Certificates for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. The Certificates are to be received and approved by the Agency before work commences and upon any contract renewal or insurance policy renewal thereafter.
2. The Certificate Holder Shall be listed as follows:  
  
State of Louisiana  
Agency Name, Its Officers, Agents, Employees and Volunteers  
Address, City, State, Zip  
Project or Contract #:
3. In addition to the Certificates, Contractor shall submit the declarations page and the cancellation provision for each insurance policy. The Agency reserves the right to request complete certified copies of all required insurance policies at any time.

4. Upon failure of the Contractor to furnish, deliver and maintain required insurance, this contract, at the election of the Agency, may be suspended, discontinued or terminated. Failure of the Contractor to purchase and/or maintain any required insurance shall not relieve the Contractor from any liability or indemnification under the contract.

**F. SUBCONTRACTORS**

Contractor shall include all subcontractors as insureds under its policies OR shall be responsible for verifying and maintaining the Certificates provided by each subcontractor. Subcontractors shall be subject to all of the requirements stated herein. The Agency reserves the right to request copies of subcontractor's Certificates at any time.

**G. WORKERS COMPENSATION INDEMNITY**

In the event Contractor is not required to provide or elects not to provide workers compensation coverage, the parties hereby agree that Contractor, its owners, agents and employees will have no cause of action against, and will not assert a claim against, the State of Louisiana, its departments, agencies, agents and employees as an employer, whether pursuant to the Louisiana Workers Compensation Act or otherwise, under any circumstance. The parties also hereby agree that the State of Louisiana, its departments, agencies, agents and employees shall in no circumstance be, or considered as, the employer or statutory employer of Contractor, its owners, agents and employees. The parties further agree that Contractor is a wholly independent contractor and is exclusively responsible for its employees, owners, and agents. Contractor hereby agrees to protect, defend, indemnify and hold the State of Louisiana, its departments, agencies, agents and employees harmless from any such assertion or claim that may arise from the performance of this contract.

**H. INDEMNIFICATION/HOLD HARMLESS AGREEMENT**

1. Contractor agrees to protect, defend, indemnify, save, and hold harmless, the State of Louisiana, all State Departments, Agencies, Boards and Commissions, its officers, agents, servants, employees, and volunteers, from and against any and all claims, damages, expenses, and liability arising out of injury or death to any person or the damage, loss or destruction of any property which may occur, or in any way grow out of, any act or omission of Contractor, its agents, servants, and employees, or any and all costs, expenses and/or attorney fees incurred by Contractor as a result of any claims, demands, suits or causes of action, except those claims, demands, suits, or causes of action arising out of the negligence of the State of Louisiana, all State Departments, Agencies, Boards, Commissions, its officers, agents, servants, employees and volunteers.
2. Contractor agrees to investigate, handle, respond to, provide defense for and defend any such claims, demands, suits, or causes of action at its sole expense and agrees to bear all other costs and expenses related thereto, even if the claims, demands, suits, or causes of action are groundless, false or fraudulent. The State of Louisiana may, but is not required to, consult with the Contractor in the defense of claims, but this shall not affect the Contractor's responsibility for the handling of and expenses for all claims.

### ATTACHMENT III: ELECTRONIC VENDOR PAYMENT SOLUTION

In an effort to increase efficiencies and effectiveness as well as be strategic in utilizing technology and resources for the State and Contractor, the State intends to make all payments to Contractors electronically. The LaCarte Procurement Card will be used for purchases of \$5,000 and under, and where feasible, over \$5,000. Contractors will have a choice of receiving electronic payment for all other payments by selecting the Electronic Funds Transfer (EFT). If you receive an award and do not currently accept the LaCarte card or have not already enrolled in EFT, you will be asked to comply with this request by choosing either the LaCarte Procurement Card and/or EFT. You may indicate your acceptance below.

The **LaCarte** Procurement Card uses a Visa card platform. Contractors receive payment from state agencies using the card in the same manner as other Visa card purchases. Contractors cannot process payment transactions through the credit card clearinghouse until the purchased products have been shipped or received or the services performed.

For all statewide and agency term contracts:

- Under the LaCarte program, purchase orders are not necessary. Orders must be placed against the net discounted products of the contract. All contract terms and conditions apply to purchases made with LaCarte.
- If a purchase order is not used, the Contractor must keep on file a record of all LaCarte purchases issued against this contract during the contract period. The file must contain the particular item number, quantity, line total and order total. Records of these purchases must be provided to the Office of State Procurement on request.

EFT payments are sent from the State's bank directly to the payee's bank each weekday. The only requirement is that you have an active checking or savings account at a financial institution that can accept Automated Clearing House (ACH) credit files and remittance information electronically. Additional information and an enrollment form is available by contacting the Office of Statewide Reporting & Accounting at [DOA-OSRAP-EFT@la.gov](mailto:DOA-OSRAP-EFT@la.gov).

To facilitate this payment process, you will need to complete and return the EFT enrollment form contained in the link above.

If an award is made to your company, please check which option you will accept or indicate if you are already enrolled.

<u>Payment Type</u>	<u>Will Accept</u>	<u>Already Enrolled</u>
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LaCarte	_____	_____
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EFT	_____	_____
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\_\_\_\_\_  
Printed Name of Individual Authorized

\_\_\_\_\_  
Authorized Signature for payment type chosen

\_\_\_\_\_  
Date

\_\_\_\_\_  
Email address and phone number of authorized individual

## ATTACHMENT IV:

## FUNCTIONAL DESCRIPTIONS OF MODULES

Functional Area	Description
Student Core and Academic Foundation	Student Core and Academic Foundation includes the definition, conversion and configuration of data and metadata needed to define the academic structure of the system. This includes all the foundational elements and controls needed to enable the conversion and configuration of student and course data including but not limited to Academic Levels (i.e., Associates, Undergraduate, Professional), Academic Units (i.e., Colleges, Schools, Departments), Programs of Study, Educational Credentials, Academic Periods and Calendars, Match and Merge rules, and Student Holds.
Student Admissions	Student Admissions includes the creation and management of applicants and supports the subsequent assessment, classification and review of application data to determine admission
Student Financial Aid	Student Financial Aid supports the calculation of needs-based and merit-based financial assistance and the supporting business processes for validation of data and eligibility determination based on cost of attendance (COA) and expected family contribution (EFC). Student Financial Aid allows institutions to setup and maintain the factors and criteria for automating the awarding of aid, including general eligibility, grade level limits, and program limits based on an institution's specific packaging methodology.
Student Records	Student Records provides institutions with the tools to manage matriculated student academic data and all the associated business processes to manage registration, academic policies, enrollment status, tuition and fee charges. Student Records is designed to be an institution's core system of record for Student data and provides the tools need to track student progress toward the completion of their educational goals by tracking program and status changes and processes related to conferral of educational credentials.
Curriculum Management	Curriculum Management is used to create and maintain course data for each institutions department, including the unique iterations of each course with course attributes and the necessary taxonomy (CIP) for IPEDS reporting, course eligibility, requisites, preclusions, and restrictions. Curriculum Management allows institutions to establish the parameters needed to control enrollment capacity in courses as well as the relative or absolute size of wait lists. Curriculum Management also supports the assignment of course sections to classrooms and any associated instructor eligibility requirements needed to enforce appropriate teaching assignments for a course offering.
Academic Advising	Academic Advising is used to define the academic requirements for an educational objective for academic entities at each institution and to determine how a student has or can meet those requirements.
Student Financials	Student Financials allows institutions to create and maintain the rules for calculating tuition and fees based on criteria relating to the student and program of study by academic time period. Student Financials is also used to determine how institutions manage and apply payments from students, financial aid, third-party payment plans, sponsors and guests as well as the administration of refunds/rebates based on student, course, and third-party criteria and requirements/regulations.
Student Reports	Workday delivers a number of pre-configured reports and dashboards to support the Student academic lifecycle from managing prospective students through matriculation and graduation



ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Student Core and Academic Foundation	<b>In Scope:</b>			
	Configuration of organizational data to support up to x Campuses	Up to 3	Up to 3	Up to 3
	Conversion and/or configuration to support up to x academic departments	Up to 50	Up to 50	Up to 50
	Configuration to support up to x Academic Levels (Graduate, Under-Graduate, Certificates)	3	6	5
	Configuration of up to x Academic Credentials (Associate, Bachelors and Masters)	6	6	4
	Conversion and/or configuration to support up to x active degree programs offered	Up to 100	Up to 200	Up to 200
	Configuration of x Academic Calendar, based on semesters	1	Up to 2	Up to 6
	Configuration to support up to x members for Student Audiences	Up to 10,000	Up to 20,000	Up to 20,000
	Configuration to support up to x% of student population are enrolled in an online, professional or Continuing Education programs	Up to 10%	Up to 10%	Up to 10%
	Student workers comprise less than x% of total employee population	Up to 45%	Up to 50%	Up to 40%
	Configuration to support tracking of up to x International students	Up to 2000	Up to 2000	Up to 2000
	Configuration to support tracking of up to x Veterans, Active Military and Military Affiliated students	Up to 2000	Up to 2000	Up to 2000
	Configuration to support tracking of up to x Differing Abilities/Accommodation students	Up to 2000	Up to 2000	Up to 2000
	Athletic compliance tracking for the purpose of determining NCAA Division II or below, eligibility for up to x athletic teams	Up to 40	Up to 40	Up to 40
	Configuration of up to x engagement campaigns per institution.	Up to 100	Up to 100	Up to 100
	Creation and scheduling to support up to x email engagements per year per institution.	Up to 60,000	Up to 60,000	Up to 60,000
	<b>Additional Scope:</b>			
	Multi-Institution capabilities to support the segregation of institutional and financial aid data and to allow for unique branding, registration and transcript processing	Out of Scope	Out of Scope	Out of Scope
	Configuration to support Medical and/or Health Sciences and/or Law programs	Out of Scope	Out of Scope	Out of Scope
	Configuration to support tracking of residency requirements for students	Manual	Manual	Manual
	Configuration for clock hour-based programs	Out of Scope	Out of Scope	Out of Scope
	Conversion and tracking of talent data for Students.	Out of Scope	Out of Scope	Out of Scope
	Dynamic content blocks for communications	Out of Scope	Out of Scope	In Scope
	<b>Assumptions:</b>			
	Workday HCM/FIN will be live before Student Move to Productions			
	Student health data is not in current SIS			
	All campuses are unified in defining course subjects and numbers, admissions requirements, programs of study and conferring credentials.			
	All campuses and learning centers are within the US			
	Academic Appointments and Period Activity Pay were deployed with HCM			

ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Financial Aid	<b>In Scope:</b>			
	Configuration to support segmentation and management of student financial aid data for x Financial Aid Office	1	1	1
	Configuration to support up to x Title IV Eligible and non-eligible Programs of Study (credential granting)	Up to 100	Up to 100	Up to 300
	Configuration and processing to support verification of CPS-selected financial aid applicants.	In Scope	In Scope	In Scope
	Configuration and/or conversion to support up to x unique action items.	Up to 50	Up to 250	Up to 50
	Configuration and conversion to support up to x communication/engagement templates.	Up to 20	Up to 250	Up to 40
	Configuration and conversion to support Distinct Cost of Attendance Items with predefined number of complex calculations	Up to 20 (incl 3 complex)	Up to 20 (incl 3 complex)	Up to 40 (incl 10 complex)
	Configuration to support x Special Aid Program of State	Up to 3	Up to 3	Up to 1
	Configuration to support up to x award items and/or financial aid funds	Up to 75	Up to 1000	Up to 1000
	<b>Additional Scope:</b>			
	Institutional Methodology	Out of Scope	Out of Scope	Out of Scope
	Alternative or Private loans utilizing CommonLine processing	Out of Scope	Out of Scope	In scope with use of integration and unique calendar requirements.
	Borrower Based Academic Year requirements	BBAY1 and BBAY3 with manual monitoring and tracking	Out of scope	Out of scope
	Configuration and calculation of financial aid using rules and methods other than those prescribed by State and Federal regulation (i.e., Institutional Methodology)	Out of Scope	Out of Scope	Out of Scope
	Support for institutional verification of financial aid applicants	Out of Scope	Out of Scope	Out of Scope
	<b>Assumptions:</b>			
	Course work that falls outside the boundaries of a Standard Academic period will need to be monitored and tracked manually.			
	State Aid Programs will be configured using existing Workday functionality available at the time of deployment including, but not limited to calculation engine, custom objects, custom reports and EIB's.			
	Only randomly selected financial aid applicants are verified, but no institutional verification is used			
	Awarding processing utilizes an external award feature			
	Institution configured all student workers using Workday HR External student, which will be converted to Workday students			
	Workday Admissions will be live prior to Financial Aid			



ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Student Records	<b>In Scope:</b>			
	Configuration and/or conversion of data to support up to x programs	Up to 200	Up to 200	Up to 200
	Configuration to support Fixed term class schedule	In Scope	In Scope	In Scope
	Configuration of x Transcript formats to support credit students	Up to 3	Up to 3	Up to 1
	<b>Additional Scope:</b>			
	Configuration of Non-credit students and courses	In Scope up to 500	Out of Scope	In Scope up to 1000
	Configuration and/or conversion of data to support Dual/Joint Programs of study	Up to 6 in scope	Up to 3 in scope	Up to 6 in scope
	Configuration for Law Schools	Out of Scope	Out of Scope	Out of Scope

ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Curriculum Management	<b>In Scope:</b>			
	Configuration and conversion to support up to x unique courses with enforced prerequisites/co-requisites	Up to 2500	Up to 9000	Up to 2500
	Configuration to support levels of approval for course changes	Up to 2	Up to 5	Up to 5
	<b>Assumptions:</b>			
	Configuration and/or conversion to support courses that may be shared across academic requirements where a course satisfies multiple requirements.			
	Configuration to support the creation and maintenance of graduation plans for each program/major that lists recommended courses and terms offered.			

ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Academic Advising	In Scope:			
	Configuration to support creation and maintenance of graduation plans for each program/major that list recommended courses and terms offered.	Up to 400	Up to 400	Up to 400
	Configuration of up to x academic advisor types	Up to 4	Up to 4	Up to 4

ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Student Financials	<b>In Scope:</b>			
	Configuration and/or conversion to support 1 chart of accounts used for Student transactions for x company within Workday Financials	2	1	1
	Configuration to support x independent Bursars offices administering student accounts	1	1	1
	Configuration and conversion to support up to x tuition fees where up to x have complex calculations and most of the tuition calculations are based on total enrolled units and the only additional fees are based on enrollment in a specific course (lab, material, fees).	125, 10	300, 10	300, 10
	Configuration to support x Institutional Payment Plans which can be assigned to students	Up to 5 Combination of Institutional and Third-Party payment plans	Up to 5 Institutional Payment Plans Only	Up to 5 Institutional Payment Plans Only
	Configuration to support x cashing vendor	1 vendor	1 vendor	1 vendor
	Configuration to support x credit card vendor	1 vendor	1 vendor	1 vendor
	Configuration to support up to x sponsor contracts	Up to 100	Up to 100	Up to 300
	Configuration to support up to x Formats for Third Party Statement	Up to 3	Up to 3	Up to 3
	Configuration to support up to x refund policies	Up to 2	Up to 2	Up to 2
	Configuration to support up to x waivers, discounts, and exemptions are administered	Up to 100	Up to 100	Up to 100
	Configuration to support internal collections	Internal	Internal	Internal
	<b>Additional Scope:</b>			
	Configuration to support waivers funded from multiple sources.	In Scope	In Scope	Out of Scope
	Configuration to support funding sources that vary by student.	Out of Scope	Out of Scope	Out of Scope
	Configuration to support real-time accounting and calculation of fees.	Out of Scope	Out of Scope	Out of Scope
	Configuration to support a shopping cart experience that may include real-time calculation of fees as is sometimes used for non-credit or professional students.	Out of Scope	Out of Scope	Out of Scope
	Configuration to support revenue allocation.	Out of Scope	Out of Scope	Out of Scope
	Configuration to support 1042-S reporting for non-US Citizens.	Out of Scope	Out of Scope	Out of Scope
	Configuration to support additional schools within the institution (ex: Medical, Law or Professional) require unique rules/requirements	1 Professional School	Out of Scope	8 Special Programs
	Configuration to support formal collections activities include sending an initial notification and manually monitoring collections activity and agreement	Internal Collection	Dedicated Staff	Internal Collection
	<b>Assumptions:</b>			
	The student's tuition and most fees are based on the total number of registered units. Only additional fees (i.e., lab fees, material fees, field trip fees, etc.) are charged based on the student being enrolled in a specific course or course section.			
	Student notifications are sent via email at a specific time each term and this applies to the entire student population			

ATTACHMENT IV (continued):

Functional Area	Scope and Assumptions	UNO	LTU	SELU
Student Reports	<b>In Scope:</b>			
	Standard Reports identified on the Workday Student Standardized Reports List			
	<b>Out of Scope:</b>			
	Workday does not guarantee or warrant that Student contains all the data needed to generate required state reports. Generation, validation and submission of these reports is the responsibility of the customer. Workday will provide the capability to export any existing data that exists in the Workday object model to support the generation of these reports but will not commit to providing all the data needed by the state(s) in which the institution resides.			

## ATTACHMENT V. SCHEDULE OF INTEGRATIONS:

The integrations below were identified as currently active and in-scope for the implementation of Workday Student. Integration consultants will be asked to assist in communication with Third Party Vendors to ensure requirements are met and configuration testing is performed as required for each integration.

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
ISIR	SINT1 Institutional Student Information Record (ISIR) Integration	Exports one file from Workday and imports one file from Workday as follows: > ISIR Corrections Outbound from Workday > ISIR Inbound to Workday	X	X	X
Target X	SINT39 Third Party Student Information System Integration / Recruiting and Admissions	Includes hours to stand up admissions processes	X		
Slate	SINT39 Third Party Student Information System Integration / Recruiting and Admissions	Includes hours to stand up admissions processes		X	X
SAT	SINT11 Education Test Results Inbound / SAT	Imports one file into Workday.	X	X	X
ACT	SINT12 Education Test Results Inbound / ACT	Imports one file into Workday.	X	X	X
GMAT	SINT14 Education Test Results Inbound / GMAT	Imports one file into Workday.	X	X	X
GRE	SINT15 Education Test Results Inbound / GRE	Imports one file into Workday.	X	X	X
TOEFL	SINT16 Education Test Results Inbound / TOEFL	Imports one file into Workday.	X	X	X
PRAXIS	SINT10 Education Test Results Inbound	Imports one file from one source system into Workday.	X	X	X
ScripSafe	SINT19 Transcript Outbound / PDF Format	Reads one file of transcript request data from a 3rd party. Responds with transcript data from Workday in one base64 encoded PDF file	X	X	
Ad Astra	SINT22 Room Scheduling System	Exports one file from Workday and imports one file to Workday as follows: > Course Section File Outbound > Room Assignment Inbound	X		
Raiser's Edge	SINT26 Demographics Outbound	Exports one file from Workday.	X	X	X
UNO Transact	SINT27 Student Housing System	Exports one file from Workday and imports two files to Workday as follows: > Student Demographics Outbound > Student Housing Assignments Inbound > Student Charges Inbound	X		
StarRez	SINT27 Student Housing System	Exports one file from Workday and imports two files to Workday as follows: > Student Demographics Outbound > Student Housing Assignments Inbound > Student Charges Inbound		X	X

ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
IDMS (MS Identity Mgmt)	SINT31 Identity Management System ( IdM )	Exports one file from Workday and imports one file to Workday as follows: > Student Demographics Outbound > Student ID/Institutional Email and WD Username Inbound	X		
IDMS (Active Directory)	SINT31 Identity Management System ( IdM )	Exports one file from Workday and imports one file to Workday as follows: > Student Demographics Outbound > Student ID/Institutional Email and WD Username Inbound		X	X
UNO Parking	SINT33 Parking Services	Exports three files from Workday and imports one files to Workday as follows: > Student Demographics Outbound > Faculty Demographics Outbound > Student Payments Outbound > Student Charges Inbound	X		
Student Health	SINT34 Student Health Services System	Exports one files from Workday and imports two files to Workday as follows: > Student Demographics Outbound > Student Charges Inbound > Student Payments Outbound	X		
NSC	SINT35 National Student Clearinghouse ( NSC )	Exports two files from Workday as follows: > NSC Enrollments Outbound > NSC Degrees Outbound	X	X	X
NSLDS (TSM and FHA)	SINT42 National Student Loan Data System ( NSLDS )	Exports one file from Workday and imports one file to Workday as follows: > TSM and FAH NSLDS Transaction Inbound > TSM and FAH NSLDS Transaction Outbound	X	X	X
COD	SINT43 Common Origination and Disbursement ( COD )	Exports one file from Workday and imports five files to Workday as follows: > COD Loan and Grant Inbound > COD Counseling Inbound > COD Informed Borrower Inbound > COD Loan Application and Credit Status > COD Master Promisary Note Inbound > COD Disbursement Outbound	X	X	X
1098-T	SINT44 IRS 1098-T Outbound	Exports one file from Workday.	X		X
CASHNet	SINT45 Payment Processing System	Exports two files from Workday and imports two files to Workday as follows: > Student Payment Punchout > Student Payment Plans Inbound > Demographic Data Outbound > Student Payments Inbound	X		

ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
NeINet	SINT45 Payment Processing System	Exports two files from Workday and imports two files to Workday as follows: > Student Payment Punchout > Student Payment Plans Inbound > Demographic Data Outbound > Student Payments Inbound			X
Follett	SINT59 Bookstore System	Exports two files from Workday and imports one file to Workday as follows: > Demographic Outbound > Student Courses Outbound > Student Charges Inbound	X		X
TOPS	SINT40 Scholarship Services System	Exports one file from Workday and imports one file to Workday as follows: > Student Demographic Outbound > External Awards Inbound	X	X	X
EFT Great Lakes	SINT41 Private Loans System	This does not include adjustments and changes. Exports one file from Workday and imports three files to Workday as follows: > Loan Certification Request Inbound > Loan Application Inbound > Loan Application Response Outbound > Disbursement Amount Inbound	X	X	
Data Warehouse	SINT47 Data Warehouse Integration	**Write custom assumptions based on the scope. See Internal Notes.	X		
Onbase Student Mapping - Outbound (Doc Mgmt)	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio	X		
Perceptive Content - Outbound (Doc Mgmt)	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	X
BOR High School Transcripts	SINT18 Transcript Inbound and Outbound / Text Format	Imports transcript data to, and exports transcript data from Workday in text file format. Reads a request file & takes one of the following actions as a result: Exports one file of transcript data from Workday in one text file format Imports one file of transcript data to Workday in one text file format  Does not handle PDF files.	X	X	X
Omnilert	SINT51 Text Messaging System	Exports one Student demographic file to a text messaging system and imports one file for Messaging communication History > Student Demographics Outbound > Inbound Communication History	X		
LiveText	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		



ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
Rave	SINT51 Text Messaging System	Exports one Student demographic file to a text messaging system and imports one file for Messaging communication History > Student Demographics Outbound > Inbound Communication History		X	
Microsoft SDS Student Information	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio	X		
Interfolio - Faculty180 Courses	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio	X		
Interfolio - Faculty180 Course Assignments	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio	X		
EAB Student Information - Outbound	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
Tableau - Student	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
Tableau - Faculty	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
CCURE - Door Access	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
SIRSI Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	X
SIRSI Student Charges	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	X
Blumen Student - Outbound	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		X
Handshake - Outbound	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	X
Weave Courses	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		X
Weave Instructors	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		X

ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
Grades First Athletic - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
Grades First Athletic - Student Class	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
Grades First Athletic - Instructors and Advisors	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
Ticketmaster	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	
Course Evaluations by Student Demographic	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	X
Course Evaluations by Student Courses	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	X
Course Evaluations by Student Instructions	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X	X	X
Student Manager	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
EAB Student Success Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )	X		
Banner - Student Records	SINT38 Third Party Student Information System Integration / Student Records	Imports four files to Workday as follows: > Student Registrations Inbound > Programs of Study Inbound > Student Demographics Inbound > Student Hold Assignments Inbound	X		
Banner - Admissions	SINT39 Third Party Student Information System Integration / Recruiting and Admissions	Includes hours to stand up admissions processes	X		
Moodle	SINT23 Third Party Learning Management System / Base Package	Exports five files from Workday as follows: > Faculty Demographics Outbound from Workday > Student Demographics Outbound from Workday > Enrollments Outbound from Workday > Courses Outbound from Workday > Course Sections Outbound from Workday		X	X

ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
SEVIS	SINT37 Student and Exchange Visitor Information System ( SEVIS )	Exports two files from Workday as follows: > International Student Data Outbound > Student Enrollments and Grades Outbound	X	X	X
ARMS	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
PowerPark - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
PowerPark - Student Charges	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio			X
TutorTrac	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
Maxient - Student Holds	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	X
Maxient - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	X
Bankmobile - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
Bankmobile - Payments	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio			X
Everbridge - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
CS Gold - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	X
CS Gold - Meal Plan Charges	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	X
CS Gold - Student Photos	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	X
Basis/Best/Stanley - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X

ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
TranscriptPlus	SINT18 Transcript Inbound and Outbound / Text Format	Imports transcript data to, and exports transcript data from Workday in text file format. Reads a request file & takes one of the following actions as a result: Exports one file of transcript data from Workday in one text file format Imports one file of transcript data to Workday in one text file format  Does not handle PDF files.			X
EZFacility - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	X
SELU Athletic Tickets	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
Pass-port - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )			X
Post Office - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
Post Office - Charges	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	
Simplicity Collect - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
PayPal Student Balances	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
Barnes & Noble	SINT59 Bookstore System	Exports two files from Workday and imports one file to Workday as follows: > Demographic Outbound > Student Courses Outbound > Student Charges Inbound		X	
Cardinal Tracking - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
Cardinal Tracking - Student Holds	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	
Retain Athletic - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	

ATTACHMENT V (continued):

Integration Name	Integration Type	Integration Details	UNO	LTU	SELU
Retain Athletic - Studen Class Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
Retain Athletic - Instructors and Advisors	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
Academic Works - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	
Academic Works - Scholarships	SINT71 Custom integration built using Workday Studio	Includes 1 integration built with Workday Studio		X	
TaskStream - Student Information	SINT74 Custom integration built using Workday Enterprise Interface Builder ( EIB )	Includes 1 integration built with Workday Enterprise Interface Builder ( EIB )		X	

## ATTACHMENT VI DATA CONVERSION SCOPE:

The table below lists all data conversion items in-scope for the Workday Student implementation at each University. University teams assisted by Workday Student representatives have identified the scope listed below. Universities are responsible for the clean-up of data in legacy systems, removal of duplicates, and reviewing accuracy of data loaded for all items listed below.

Data Conversion	Area	UNO	LTU	SELU
SDCN2 Student Personal Information / Up to x over a maximum implementation duration of 24 months	Student Records	Up to 15,000	Up to 30,000	Up to 30,000
SDCN6 Student Matriculations / Up to x over a maximum implementation duration of 24 months	Student Records	Up to 15,000	Up to 30,000	Up to 30,000
SDCN10 Courses / Up to x over a maximum implementation duration of 24 months	Curriculum Management	Up to 8,000	Up to 20,000	Up to 20,000
SDCN14 Course Sections / Up to x over a maximum implementation duration of 24 months	Curriculum Management	Up to 24,000	Up to 60,000	Up to 60,000
SDCN18 Student Course Registrations / Up to x over a maximum implementation duration of 24 months	Student Records	Up to 480,000	Up to 1,000,000	Up to 1,000,000
SDCN23 Student Program of Study Assignment Snapshots / Up to x over a maximum implementation duration of 24 months	Student Records	Up to 30,000	Up to 60,000	Up to 60,000
SDCN25 Historical Students	Student Records	Imports up to 250,000	Imports up to 450,000	Imports up to 450,000
SDCN26 Historical Credit Activation Mapping	Student Records	Imports up to 50,000	Imports up to 50,000	Imports up to 50,000
SDCN27 Student Recruitments	Student Recruiting	Out of Scope		
SDCN28 Recruiting Notes	Student Recruiting	Out of Scope		
SDCN29 Student Applications	Admissions	Will use Integration		
SDCN31 External Transcripts	Student Records	Imports up to 30,000	Imports up to 30,000	Imports up to 120,000
SDCN32 Transfer Articulations	Student Records	Imports up to 30,000	Imports up to 30,000	Imports up to 90,000
SDCN33 Student Educational Institution	Academic Foundation	Imports up to 40,000	Imports up to 60,000	Imports up to 60,000
SDCN34 Student Educational Institutional Courses	Academic Foundation	Imports up to 60,000	Imports up to 120,000	Imports up to 120,000
SDCN35 Transfer Credit Rules	Admissions	Imports up to 10,000	Imports up to 10,000	Imports up to 50,000
SDCN36 Education Test Results	Academic Foundation	Imports up to 30,000	Imports up to 30,000	Imports up to 120,000
SDCN37 Student Academic Period Overrides	Academic Foundation	Imports up to 80,000	Imports up to 240,000	Imports up to 240,000
SDCN38 Student Records and Advising Holds	Student Records	Imports up to 20,000	Imports up to 20,000	Imports up to 20,000
SDCN39 Student Friends and Family	Academic Foundation	Imports up to 15,000	Imports up to 50,000	Imports up to 50,000
SDCN41 Student Cohort Membership	Academic Foundation	Imports up to 15,000	Imports up to 30,000	Imports up to 30,000
SDCN42 Student Accommodation and Disability Information	Academic Foundation	Imports up to 100	Imports up to 1,000	Imports up to 1,000

ATTACHMENT VI (continued):

Data Conversion	Area	UNO	LTU	SELU
SDCN43 Universal Identifiers	Academic Foundation	Imports up to 1 for each converted Active Student	Imports up to 1 for each converted Active Student	Imports up to 1 for each converted Active Student
SDCN44 Athletic Teams and Members	Student Core	Imports up to 1,000	Imports up to 4,000	Imports up to 4,000
SDCN45 Student International Data	Student Core	Imports up to 2,000	Imports up to 4,000	Imports up to 4,000
SDCN46 Student Residencies	Student Core	Imports up to 15,000	Imports up to 15,000	Imports up to 30,000
SDCN47 Academic Requirement Rules	Academic Advising	Imports up to 15,000	Imports up to 15,000	Imports up to 15,000
SDCN48 Academic Requirement Overrides	Academic Advising	Imports up to 15,000	Imports up to 15,000	Imports up to 30,000
SDCN49 Instructor Eligibility	Student Records	Imports up to 2,000	Imports up to 6,000	Imports up to 6,000
SDCN50 Student Records and Advising Notes	Student Records	Imports up to 5,000	Imports up to 15,000	Imports up to 15,000
SDCN51 Transcript Notes	Student Records	Imports up to 30,000	Imports up to 100,000	Imports up to 100,000
SDCN53 Workday Accounts	Student Records	Imports up to 1 for each converted Active Student	Imports up to 1 for each converted Active Student	Imports up to 1 for each converted Active Student
SDCN56 Student Financial Account Notes	Student Finance	Imports up to 20,000	Imports up to 20,000	Imports up to 20,000
SDCN57 Account History for Active Students	Student Finance	Imports up to 300,000	Imports up to 300,000	Imports up to 300,000
SDCN58 Student Charges	Student Finance	Imports up to 30,000	Imports up to 80,000	Imports up to 80,000
SDCN61 Financial Aid Notes	Financial Aid	No Workday Deliverable	No Workday Deliverable	No Workday Deliverable
SDCN63 Student Financials Holds	Student Finance	Imports up to 20,000	Imports up to 20,000	Imports up to 20,000
SDCN64 Course Prerequisites	Curriculum Management	Imports up to 10,000	Imports up to 10,000	Imports up to 10,000

## ATTACHMENT VII: COST PROPOSAL WORKSHEET

### Instructions:

Proposer(s) must complete the cost proposal in the following format to be considered for award. Failure to complete will result in disqualification of the Proposal. **Any Proposals with blank fields or with any changes to this worksheet may be determined non-responsive.**

Proposer(s) shall provide an on-site hourly rate and remote rate for each of the job categories listed below. The Proposer shall provide fully burdened hourly rates, including but not limited to travel and project expenses.

***Proposer(s) shall provide the number of Remote and On-Site Hours that will be needed for the Project Phases listed: Planning Hours, Architect, Configure and Prototype, Test Hours, Deploy Hours, and Post Go-Live Support Hours.***

Proposer shall multiply its Fully Burdened On-Site Hourly Rate, by the Number of Hours proposed, and the Fully Burdened Remote Hourly Rate, then multiplying by the Number of Hours per Phase to come up with a Total Hours Cost for each Project Role. The Total Project Role Costs will then be added together to obtain the Total Project Cost.

The proposed hours are being utilized for evaluation purposes and do not represent a commitment by the State to incur the costs projected in this schedule. Contractor will be paid the proposed rates or a negotiated lower rate per project role and the total hours worked per the project role.



## ATTACHMENT VII: COST PROPOSAL WORKSHEET

Total Services cost for evaluation.

Project Roles	Project Phases															
	Hourly Rate		Planning Hours		Architect		Configure & Prototype		Test Hours		Deploy Hours		Post Go Live Support		TOTAL HOURS	
	Remote	Onsite	Remote	Onsite	Remote	Onsite	Remote	Onsite	Remote	Onsite	Remote	Onsite	Remote	Onsite	Remote	Onsite
Project Director															-	-
Engagement Manager															-	-
Sr. Consultant															-	-
Functional Consultants															-	-
Integrations Developer															-	-
Data Conversion Consultant															-	-
Delivery Assurance Consultants															-	-
Total Services Cost for Evaluation	\$0.00															

## **Attachment VIII: Staff Roles, Responsibilities, Skill, and Experience**

### **1. Project Director**

#### **Responsibilities**

The Project Director provides direction to the deployment team and manages critical deliverables, milestones, issues and project risks. The Project Director assists in managing executive stakeholder engagement and participates in Steering Committee meetings.

- Lead Facilitator - Represent the project and the executive team in escalations with Workday project and product management;
- Planning Activities – Participates in regular meetings to monitor and provide status on performance and priorities;
- Delivery Oversight - Partner with Implementation Team and PMO to ensure adherence to deployment methodology, program standards and governance;
- Customer Success - Leverage broad-based industry knowledge and deployment expertise to ensure customer success

#### **Skills and Experience**

- Ten (10) years of project and program management of large, complex technology deployments with direct interaction with senior executives
- Previous experience having worked within a Consulting firm/practice as a Program Manager, Sr. Project Manager, Management Consultant, etc.
- Mastery of project and program management skills
- Experience in dealing with a diverse set of people and ideas and demonstrating a spirit of openness, adaptability and willingness to work toward compromise when needed;
- Ability to adapt to ambiguous situations on a consistent basis;

Advanced communication skills - both written and oral. Ability to simplify complex concepts and messages to essential components, and deliver effective messages to a wide range of audiences.

### **2. Engagement Manager**

#### **Responsibilities**

The Engagement Manager guides the Workday Student deployment team in using the Workday Student deployment methodology. The Engagement Manager is responsible for the project plan, staffing of resources, execution of tasks, budget adherence, and management of project risks and resolution of issues that arise.

- Project Planning – Staffing and management of resources
- Monitor and Control – adherence to budget, document and track risks.
- project activities and providing guidance on the deployment of Workday Student.

#### **Skills and Experience**

- Five (5+) years or more of experience in Higher Education using and/or implementing Workday Student
- Three (3+) years or more of experience in Higher Education or State / Local Government
- Successful project management experience leading medium to large ERP implementations
- Knowledge of Student Information Systems
- PMP certified

### **3. Sr Consultant**

#### **Responsibilities**

Responsible for the architecture and support of consultants for workstreams of Workday Student. The architect will provide guidance and assistance during configuration and design sessions in accordance to scope and requirements.

- Lead design workshops to aid Universities in decisions recommending best practices related to functionality in Workday Student.
- Identify strategies, risks, and options, recommend solutions and approach to meet University functional requirements.
- Responsible for functional and technical, Ellucian Banner or Colleague, PeopleSoft Campus Solutions, or similar applications.
- Subject Matter Expertise in at least one of the following functional areas or business units: Student Affairs, Student Recruiting and Admissions, Enrollment Management, Student Advising, Student Records, Registrar Office, Student Billing, Student Accounts, Bursar, and Financial Aid.

### **4. Functional Consultant(s)**

#### **Responsibilities**

Functional Consultants are responsible for ensuring the successful implementation of Workday Student. Functional Consultants will focus support in one or more areas including Academic Foundation, Student Recruiting and Admissions, Curriculum Management, Student Records, Academic Advising, Financial Aid, Scholarships and Awards, and Student Financials.

- Lead workshops to assist in the understanding and utilization of the features and functions of Workday Student.
- Responsible for functional and technical project activities and providing guidance on the deployment of Workday Student.
- Document and configure the Workday Student solution to enhance user and student experience.
- Assist in testing activities

#### **Skills and Experience**

- Three (3+) years or more of experience in Higher Education using and/or implementing Workday Student, Ellucian Banner or Colleague, PeopleSoft Campus Solutions, or similar applications.
- Experience working in at least one of the following functional areas or business units: Student Affairs, Student Recruiting and Admissions, Enrollment Management, Student Advising, Student Records, Registrar Office, Student Billing, Student Accounts, Bursar, and Financial Aid.

### **5. Integrations Developer**

#### **Responsibilities**

Build and configure integrations in accordance to configuration requirements set by Functional Consultants and University teams. The Integrations consultants participate in all stages of the project and are responsible for the support of integration testing activities.

## **Skills and Experience**

- Three (3+) years or more of experience in interface architecture including Web Services and APIs
- Three (3+) years or more of experience in Higher Education or State / Local Government
- Ability to work and coordinate with third parties on data related inquiries.
- Experience with interface, networking, and data warehousing technologies, as well as design, relational database technologies, and performance tuning .
- Experience with Web Services and APIs (WSDL, SOAP, REST and WS standards)  
Strong technical experience with XML and XSLT.
- Knowledge of Workday implementation tools (Enterprise Interface Builder (EIB), Workday Studio, Workday Report Writer-BIRT, Core Connectors).
- Understand basic database architecture, tables, functional interactions, and recognize and understand impacts to downstream systems.
- Strong attention to detail, problem solving, troubleshooting and analytical skills.

### **6. Data Conversion Consultant**

#### **Responsibilities**

Responsible for assisting in the conversion strategy and execution of data loads. Data Conversion consultants will work with Functional Consultants, IT teams at the institutions, and business analysts in the mapping of data according to configuration requirements set by the project team. Data Conversion Consultants assist in the resolution of data related issues and guide the institution teams in the use of best practices in the preparation of the data for loading into Workday.

#### **Skills and Experience**

- 3+ years of experience in a customer facing role implementing Workday
- 3+ years building integrations, data conversion or reporting solutions
- Ability to work with ETL Software, Web Services, XML / XSLT, Microsoft Excel
- Understanding of data modeling concepts with ability to manipulate data using software tools
- Experience developing Integrations, Data migrations and Advanced Reports
- Functional application experience in Workday HCM, Financials or Student Information Systems

### **7. Delivery Assurance Consultant(s)**

#### **Responsibilities**

Responsible for monitoring deployment deliverables. The Delivery Assurance consultant will monitor deliverables and review configuration at quality checkpoints for the project. It will concentrate on functional issues identification, provide knowledge and industry best practices to ensure the successful deployment of the Workday application.

#### **Skill and Experience**

- 5+ years of experience in a customer facing consulting role
- Workday certification for Workday Student
- Working knowledge of Workday Student industry best practices and University policies
- Excellent organization, time management, and communication skills
- Ability to present complex technology concepts and resolutions to all levels of the organization